



Work Orders

Planon Software Suite

Version: L105

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About this Document

Intended Audience

This document is intended for *Planon Software Suite* users.

Contacting us

If you have any comments or questions regarding this document, please send them to: support@planonsoftware.com.

Document Conventions

Bold

Names of menus, options, tabs, fields and buttons are displayed in bold type.

Italic text

Application names are displayed in italics.

CAPITALS

Names of keys are displayed in upper case.

Special symbols

	Text preceded by this symbol references additional information or a tip.
	Text preceded by this symbol is intended to alert users about consequences if they carry out a particular action in Planon.

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About Work Orders

Work Orders provides the pivotal crucial features related to work management and helps streamline your order related processes. Whether you want to create, track or manage orders of different kinds, such as work orders, service requests, reservations or requisitions, the Work Orders TSI offers plenty of solutions.

Front office and back-office activities come together in Work Orders , offering you the ideal tool to keep full control over your workflow.

Interaction with other TSIs

TSI	Relation with Work Orders
<p>Service Desk: is used by front-office employees to register and allocate service requests, complaints, faults and requisitions from FM customers.</p>	<p>All requests and requisitions that are registered in the Service Desk TSI are processed and monitored in the Work Orders TSI.</p>
<p>Reservations: a reservation may contain a single suborder or multiple suborders, for example catering and cleaning orders.</p>	<p>These suborders are automatically assigned and listed in Work Orders .</p>
<p>Moves : deals with regular moves of personnel, assets or special items.</p>	<p>The move requests and move orders that are added in Moves can be processed and monitored in Work Orders .</p>
<p>Planned Maintenance : deals with maintenance of assets.</p>	<p>The maintenance orders that are added in Planned Maintenance can be processed and monitored in Work Orders .</p>
<p>Assets : enables you to register and retrieve data on your company's assets, such as installations, systems, furniture and other assets.</p>	<p>Any incidents or problems recorded in Service Management can be linked to configuration items in Assets .</p>

Work Orders - Concepts

For a better understanding of Work Orders , the concepts in Work Orders are explained in this section.

See the links below for more information:

- [Orders](#)
- [Show Related orders](#)
- [Workflow and status transitions](#)
- [Order costs](#)
- [Order groups](#)
- [Order lines](#)
- [Communication logs](#)
- [Communication logs for PMFS orders](#)
- [Order preferences and defaults](#)
- [Answer lines](#)
- [Budgets](#)

Answer lines

If an order is based on a standard order with a linked questionnaire, answer lines are displayed on the **Order details** level in Work Orders . Answer lines display the answers given to the questions on the **Questionnaire** tab (**Orders** selection level). It is also possible to record the answer line history, which enables you to see changes made on the answers.



If a questionnaire is changed, any given answers will remain available as details on the related orders.

For example if a question is unlinked from a questionnaire or a different question is linked, the 'old' question is no longer available on the form, but any given answers will remain visible as details.

Budgets

The **Budgets** selection step at the **Components** selection level can be used to retrieve all orders corresponding to the selected budget(s). The budget data on this step provides information on the budget from which order costs are going to be deducted.



Budgets are maintained in Budgets . For more information on maintaining budgets, refer to Budgets .

Last minute risk assessment

The Last Minute Risk Assessment or LMRA is a brief generic questionnaire about the risks associated with the work to be performed. It is shown just before work starts and must be carried out there and then.

LMRA questionnaires can be configured in **Questionnaires** and activated in AppSuite **Order settings**.

The LMRA questionnaire is displayed in the Planon AppSuite > **Health & safety wizard** if an EHS check is required for the job. See the AppSuite user guide for information on filling in an LMRA in the **Health & safety wizard**.

In the back-office, the answers to the LMRA questionnaire are stored as order details. Therefore, it is recommended to configure the **Last minute risk assessment** selection step at **Order details** and the **Answer lines** at **Order subdetails** in **Work Orders** .



For more information on configuring LMRAs, see Planon AppSuite - Configuration Guide > Configuring a 'Last minute risk assessment'.



In the **Health & safety** TSI, you can also configure another type of risk assessment: 'dynamic' risk assessments. This type of risk assessment is only shown to engineers / tradespeople at the right time during the work, and only for relevant activities and locations.

Orders








All FM or maintenance tasks and activities that are directly registered in Work Orders or registered via associated Web Client TSIs, such as **Service Desk**, **Reservations**, Moves and **Maintenance Manager**. Orders can also be entered via Planon Self-Service or via apps such as Planon Mobile Field Services.

Order types

Order types are either predefined system order types, or user-defined order types that have been specially created for your organization.

The following table describes the system order types that are available in Planon ProCenter .

Order types	Planon icon	Primary TSIs
Work orders		Work Orders

Order types	Planon icon	Primary TSIs
Requests		Service Desk, Work Orders
Reservations		Reservations
Requisitions		Service Desk, Work Orders
Purchase orders		Work Orders , Purchasing
Move requests		Work Orders , Moves
Move orders		Work Orders , Moves
Maintenance orders		Work Orders , Maintenance Planner

Requests

Service requests that are added by front office personnel in **Service Desk** or by building users via **Planon Self-Service** are processed and monitored by back-office staff in Work Orders . It is also possible to add, modify and delete requests directly in Work Orders .

For more information on adding a request, refer to [Adding orders](#).

Requisitions

If you want to order products / catalog items in Work Orders you can add a requisition. You can add a requisition directly or add a requisition to an existing request, order or reservation. For each item or set of items you order, you have to add a requisition line.


It is possible to add requisition lines directly to a work order (including standard orders) or to a planned maintenance order.

Requisitions can also be added in **Service Desk**. The requisitions that have been added in **Service Desk** become available in Work Orders for processing by the back-office.

Purchase orders

If you need items that must be purchased first, you can order these via a purchase order. You either add a purchase order directly or add it as a suborder to an existing order (request, work order, reservation, contract order, move order or maintenance plan order). For each purchase item you order, you must add a purchase order line, stating the details of purchase and the required quantity.

Purchase orders can also be added in the Purchasing TSI as part of an integrated demand and supply process.

 Refer to the Purchasing documentation for more information on dealing with the demand and supply requirements in your organization.

Maintenance orders


Maintenance orders are generated in **Maintenance Manager** for individual activities or clusters of activities in a maintenance plan. After the order generation, the maintenance orders including order lines, estimates and check list items are automatically added at **Orders** and **Order details** in Work Orders . In Work Orders you can monitor these maintenance orders, add suborders to them and change their status.

The corresponding maintenance activities, from which the maintenance orders have been generated, can be viewed at **Order details > Maintenance activities**. Any checklist items that belong to a maintenance order are available at **Order subdetails**, where they can be used to generate forms (for example job tickets) with the **Report Manager**.

Order hierarchy

Orders are hierarchical elements, which means you can add suborders of various types to a main order.

Suborders can inherit some field values from the main order, such as the property and order group. The name and code of the main order to which a suborder belongs, is displayed in the **Parent level** field.

 If the **Parent level** field is not available on your suborder's layout, contact your Planon ProCenter administrator for more information.

The following tables display the order types that you can add as suborder to the various order types.

The top rows lists main order types, the left column lists suborder types. **Y** indicates that you can add this type of suborder to the main order and **N** indicates that you cannot. Note that some order types cannot have suborders at all.

Main order >	Request	Work order	Reservation	Maintenance order
Suborder				
v				
Request	N	N	N	N
Work order	Y	Y	Y	Y
Reservation	N	N	Y	N
Requisition	Y	Y	Y	N

Main order >	Request	Work order	Reservation	Maintenance order
Suborder v				
Purchase order	Y	Y	Y	Y
Move request	N	N	N	N
Move order	N	N	N	N
Maintenance order	N	N	N	N

Main order >	Requisition	Purchase order	Move request	Move order
Suborder v				
Request	N	N	N	N
Work order	N	N	N	Y
Reservation	N	N	N	N
Requisition	N	N	N	Y
Purchase order	N	N	N	Y
Move request	N	N	N	N
Move order	N	N	N	N
Maintenance order	N	N	N	N

Order costs

Order costs (either internal or external) can be registered in Planon ProCenter from the time you start receiving quotations to the moment you start paying your bills (invoices). For more information on how to register costs in Planon ProCenter, refer to [Cost management in Work Orders](#).

Order lines can be added to the various order types if you need to order or purchase items or if you need specific services that involve costs.

See the following links for more information on order lines:

- [Adding order lines](#)
- [Adding requisition lines](#)
- [Adding purchase order lines](#)

Order groups

Order groups are used to categorize orders systematically into logical groups. For example, Health safety, IT services, Mechanical, Electrical, FM services and so on.

An order group is a hierarchical element which can be divided into subgroups. You can create a maximum of five levels. When you add a new order group a **Code** is automatically generated. That also applies to suborder groups (**Code group** field).

Order groups are available at the **Components** selection level. By selecting an order group before going to the **Orders** selection level, you can filter out orders that belong to the selected order group.

Order lines


Special lines can be added to various order types to order / request/ purchase items and services.

It is possible to add:

- order lines for work orders,
- requisition lines for requisitions,
- purchase order lines for purchase orders.

In those lines you can specify the exact details of the items or services to be ordered.

For more information on adding order lines, requisition lines or purchase order lines, refer to [Working with order lines](#).


 You can keep track of changes made to order lines, by enabling the **History** functionality. History includes the user who changed the value in a field, the old and new values of the field and the time and date at which the value was changed. You can select which data fields of the order line you want to keep a history on. Your application manager can enable an automatic **History** option for individual fields belonging to order lines in **Field definer**. Once this option is enabled, changes to that field's value are saved automatically. These changes can then be viewed on the associated **History** selection step at **Order subdetails** in the **Work Orders** (Work overview) TSI.

Order preferences and defaults

Your Planon application manager will configure *preferences* on orders to create pre-filtered lists in dialog boxes that you can open from within fields, for example the list of tradespeople in the **External tradesperson** field.

Similarly, *defaults* are preconfigured on orders to specify which tradespeople or coordinators, either internal or external, are presented to you as default values on the order's data section, as soon as you select a specific property, order group or trade for which these defaults have been registered.


Preferred or default tradespeople and coordinators are linked to either a trade or an order group.

 For more information on the configuration of defaults and preferences, refer to Supporting data > Defaults and preferences.

Legend for priority coloring

You can click **Legend priority coloring** on the action panel to display the **Priority order coloring** dialog box.

The **Legend priority coloring** displays the coloring scheme for the selected order. The legend makes clear why the orders in the elements list are displayed in a certain color. Each color corresponds with a different priority

 The **Legend priority coloring** is only available for those order types for which priority coloring is actually configured.


 For more information, refer to Supporting data > Priority coloring.

The **Legend priority coloring** is NOT available:

- If no color settings are configured in the Priority coloring TSI.
- If no order with color priority settings is selected in the elements list.

Work assignment

Work assignments make it possible for one person or multiple persons to work on the same order at different times.

 If you have set the **Field definer** order setting **Activate 'Multiple Work Assignments?'** to **Yes**, you can create *multiple, active work assignments* under a single order at Order details > Work assignments. This enables multiple tradespeople to work on this order, each according to their own individual 'planning'. If select **No** on this setting, there will only ever be 1 work assignment to each order (work order, move order, PPM order).

The work assignment(s) will be displayed on:

- the **Work assignments** selection step in the **Work Orders TSI**

- the **Resource Planner** planboard
- on the **AppSuite** app > My Jobs

Difference between order and work assignment:

In the **Order** fields you describe **WHAT** and **WHERE** work needs to be done. So, the location of the actual work and the 'job description' will be the same for all work assignments. *Example:* a check of the proper operation of all emergency lighting throughout a building.

On the **Work assignment(s)** that you add to the order you describe **WHEN** this work must be done and **WHO** is carrying it out. So, the person carrying out the work and the time when the work is picked up can differ per work assignment.

Consequently, the following data must be entered for each work assignment:

- Internal tradesperson
- Order
- Code

You can create work assignments for the following order types:

- Work orders
- Move orders
- Planned maintenance orders



As soon as you fill in the **Internal tradesperson** on the order, a corresponding work assignment is created automatically.

For more information on work assignments, see the *Work Assignments* user documentation.

Work assignments can be added in:

- **Work Orders** > Order details > Work assignments.
- **Resource Planner**

If configured in your Planon environment, you can also view or edit a person's work assignments in **Personnel** > Details > Work assignments.

If you fill in an internal tradesperson on the order, who is also a field engineer using a PMFS app, and you set the work assignment status to **Assigned**, it will be sent to this person's mobile device. The job can be picked up on site, and subsequently updated and finished. The work assignment is then returned to the back-office for further administrative processing.

Workflow and status transitions

All order types have predefined statuses and status transitions to indicate the current phase a particular task is in. For example **Requisition reported** or **Request in progress**. The number and type of status transitions available on the action menu depend on the settings that were made in your specific situation.

Work-related questionnaires

A **Work-related questionnaire** is a specific questionnaire concept, with its own business object (**Work-related questionnaires** business object), which can be used to link questionnaires to the PMFS Live app , after which they can be completed on the app.

Work-related questionnaires can be displayed *dynamically* in the workflow of a work assignment (so, on configured status transitions). This makes work-related questionnaires specifically suited for use on mobile apps, because they can be shown to users at a relevant moment in their workflow.



Regular or 'fixed' questionnaires (**Questionnaires** business object) can only be displayed on the **Done** status of the linked order / work assignment. See [Questionnaires](#) for more information.

Planon application managers can configure this feature by defining a **Questionnaire - work assignment scope**, linking this scope to a standard order and to a work assignment status transition (corresponding with a mobile status transition).

Work-related questionnaires allow for *mandatory* questions. Planon's [multiple active work assignments functionality](#) is also supported, so the same questionnaire can be presented to multiple individual app users, who can each fill in and submit their answers.

Scopes for work-related questionnaires are configured in Questionnaires . See: [Defining a scope for work-related questionnaires](#).



The **Work-related questionnaires (base)** business object has subtypes. One subtype is the **Work-related questionnaire**. Another subtype is the **LMRA** questionnaire, which is used in Planon's **Health & Safety** solution. Back-office staff can view completed questionnaires that are linked to orders in the Work Orders TSI. Both **LMRAs** and **Work-related questionnaires** are displayed on the on the Order details > Work-related questionnaires selection step and the Order subdetails > Answer lines selection step, while LMRAs are also shown on a dedicated Order details > Last minute risk assessments selection step.

Working with Work Orders

The Work Orders TSI in Planon ProCenter is a 'hub' where the workload is registered to be monitored, prepared, allocated and administratively completed.

This chapter explains the processes that can be performed in the Work Orders TSI. Your entire order administration, including workflow, use of 'standard' orders, costs management is outlined in this chapter.

Substantial numbers of orders may generated within your organization on a daily basis. These orders are likely to be classified into many different types. The way your Planon environment is configured and authorized, determines which orders are shown to you. For example, if your organization has decided to purchase the **Reservations** and **Service Desk** TSIs, **Work Orders** can be used to track and monitor reservations, requisitions and service requests.

Depending on your configuration, you can create different types of orders in Work Orders , such as:

- Work orders
- Requisitions
- Purchase orders
- Move orders
- Reservations
- Requests


Finding existing orders using the Components level


You can find specific orders using the various filter criteria available on the **Components** level.

Procedure

1. In Work Orders , go to Components.
2. Select a relevant selection step:
 - **Order groups**
 - **Statuses**
 - **External requestors**
 - **Departments**
 - **Budgets**
 - **Catalog items**

- **Cost center**
- **Trades**
- **Assets** - You can use the **Assets** step to find the orders that are related to selected asset(s). An asset can be linked directly to an order (via the **Asset** reference field) or indirectly, via the **Asset** reference field of the maintenance activity. On the **Orders** step you will see both work orders and PPM orders with clustered maintenance activities that are related to the selected asset(s).
- **Addresses**
- **People** - On the **People** step you can use the selection step filter above the elements list to filter by a specific personnel reference, for example: **Internal tradesperson, Internal coordinator, To be approved by** etc. This selection step filter also works if you use multiple work assignments on an order.

 With the introduction of the **Work assignments** feature, a work order can have multiple internal tradespeople assigned, after which the **Internal tradesperson** field is grayed out on the order. However, if **Activate 'Multiple Work Assignments'?** is set to **Yes** in Field definer > Orders > Business object settings, you will still be able to filter out work orders that are assigned to a certain tradesperson at the **Orders** level.

 The components listed above are among the most used filter criteria, but the list is not complete. Which components are available to you, depends on your configuration.

3. In the element list, select one or more elements. For example, People.
4. Go to the Orders step. All the orders related to the selected element, in this case People, are displayed.

Adding orders

The procedure to add a new orders of any order type is as follows:

Procedure

1. Go to Orders.
2. On the action panel, click Add and select the required order type (Request, Requisition, Work order, Purchase order, Move order etc.).
3. Complete the fields in the data section.

For more information on the available fields, refer to [Order fields](#). The newly added order is automatically given an initial status. If required, you can still modify the order data at this stage. For the available statuses of an order, refer to [Workflow and status transitions](#)

4. Click OK.

A new order is created.

Adding a suborder

You can add one or more suborders to a main order. For example, catering orders, cleaning orders, health and safety orders, waste and recycling orders and so on.

Procedure

1. Go to Orders.
2. Click Add sub on the action panel and select the required order type (Request, Requisition, Work order, Purchase order, Move order etc.). The newly added suborder is automatically given an initial status.
3. Complete the fields in the data section. For more information on the suborder fields refer to Order data.
4. Click OK. A new suborder is created.



Adding large numbers of suborders to an order can have a negative impact on the performance when processing orders. It depends on your local infrastructure how much the number of suborders will affect the performance.

Adding work assignments in **Work Orders**

You can add multiple work assignments to an order in **Work Orders** . For information on the work assignment concept, see [Work assignment](#).

Procedure

1. In **Work Orders** , select an order for which you want to create work assignments and go to Work order details.



If the order includes suborders to which you want to link work assignments, select the relevant suborder and drill down to Order details > Work assignments.

2. On the Work assignments action panel, click Add.



To create multiple work assignments, you can either copy the work assignment and modify its details, or you can add a new work assignment.

3. On the data panel, fill in the work assignment data.

For more information, see [Work assignment fields](#).

4. With each new work assignment, decide whether to allocate it to:
 - the same **Internal tradesperson** and a different **Start-date-time**
 - a different **Internal tradesperson** and the same / another **Start-date-time**
5. Click Save.

The work assignment is added in the Planned status. From here on, it will go through the configured workflow. The status of the key work assignment will automatically update the status of the order.



For information on configuring status mapping between order and work assignment see [Status mapping](#)

Adjusting the view of the orders list

To find relevant order information more quickly, you can adjust the view of the orders list in several ways, using the toggle buttons that are available at the top of the list.


The order list view can be toggled in several ways to obtain a different *focus* on the orders in the list. This can help you to retrieve the required information quicker. You can, for example, extend the list by displaying related or archived orders, or apply coloring to indicate the orders' priority. See the following sections for more information:

- [Show related orders](#)
- [Show related orders on update](#)
- [Show color based priority](#)
- [Show where documents are attached](#)
- [Show archived orders](#)



Show related orders
Show related orders on update
Show color based priority
Show where documents are attached
Show archived orders

Show related orders

If you want to view the orders in their 'family' context, irrespective of the selection you


have made, click the **Show related orders**  toggle button in the element list toolbar, to display the related main orders or suborders.

If the button is activated, orders which are a member of the selected order's 'family' are also displayed in the elements list, in a lighter shade, even though these orders do not belong to your current selection.

- ▼  ▶ 169.00, Lift not working_1 (1098L)
-  ✓ 169.01, Lift not working_1 (1098L)

Show related orders on update

It is possible to have the related orders of an order displayed after saving an update, such as changes in field information, status transitions or adding suborders. This enables you to work on a different order within the same order context.

By clicking the **Show related orders on update**  toggle button on the element list toolbar, the whole context of related orders is shown in the elements list after saving the order.

Show color based priority

If the **Show color based priority** setting is applied, the order descriptions in the elements list are displayed in different colors. The order descriptions are colored in accordance with the settings made in Supporting data and with **Date-time coloring** set on the order.

Tip

For more information on coloring orders based on priority settings, refer to Supporting data > *Priority coloring*.

If you click the **Show color based priority** icon on the toolbar, the **Color based priority settings** dialog box opens where priority coloring can be enabled for orders.

The settings also determine the range within which order coloring will be applied, if their **Date-time coloring** falls within the set range.

You set the range of days with reference to the current date.


These settings can be made per worker / engineer so that he / she is informed about the priority of the completion of the orders.



Tip

The applied calendar plays an important role in the calculation of the difference in **Date-time coloring** and the current date-time. For more information on calendar settings, refer to *System settings*.

Show where documents are attached

To easily identify orders that have linked documents through communication

logs, you can use the **Show where documents are attached**  button located in the element list toolbar. If there are any documents attached, a paperclip icon

 *  251.00, Service Scheduler will be displayed next to the order description in the element list, providing a visual cue. To access the attachments, navigate to Order details > Communication logs - orders, where you can view them.

If the **Inherit communication logs from main order** option in Field definer is set to **Yes**, suborders will also display a paper clip icon if a communication log with a document is linked to the main order. For more information on order settings in Field definer, see [General order setting fields](#).

Note The icon is only displayed if one of the following fields in **Communication logs - orders** has a value:

- **Document**
- **Secure document**
- **PAL document**
- **Invoice document**

Show archived orders

In order to limit the number of orders displayed in the elements list and to reduce the loading time of the numerous archived orders, you can specify a period for which archived orders must be displayed. By default, archived orders are displayed over a five year period prior to the current system date. You can change the period to be displayed upon opening the archive.

Procedure

1. Go to the Orders level.
2. On the element list toolbar, click the Show archived items toggle button.

The Archive settings pop-up opens.

3. Select the From and To dates to enter the period for which the archived orders must be displayed.

The archive is shown dynamically according to the default date settings: if the From date field is set to the exact current date – 5 years and if the To date field is set to the exact current date, for example, if today is 02-03-2020, the period taken is from 02-03-2015 till 02-03-2020. The next day, the pop-up will display the period from 03-03-2015 till 03-03-2020.

Note

When displaying archived items, the order's **Reported on** field is taken into account.

4. Click OK.

The archived orders are displayed for the specified period.

If you want to adjust the archive period to be shown, for example to less than five years, you can use macros to do that.

Displaying additional requestor / asset information on an order

Additional information on the requestor or the asset linked to an order, may be displayed on the order. This additional information is shown in a pop-up when the requestor or asset is entered.





The information in the pop-up is derived from the **Information text** field on the layouts of **Persons** in Personnel and **Assets** in Assets . For more information, see Personnel or Assets .


Viewing an order's health and safety information

In the Work Orders TSI , you can view the health & safety information that applies to a selected order. The following actions can be used for this purpose:

- **Show hazards** - displays hazards that are relevant for this order
- **Show method statements** - displays applicable method statements
- **Show risk assessments** - displays applicable risk assessments (questionnaires)
- **Show work-related activities** - displays the anticipated hazardous activities

 These actions are only available for Work orders, Move orders and PPM orders.

 For more information about adding actions to a layout, refer to the *Layouts* user documentation.

 For information on configuring health & safety data on orders, see the *Health & safety* user documentation.


Procedure

1. Go to Orders.
2. Select the order for which you want to view health & safety information.
3. Depending on which health & safety information you want to view, click Show hazards, Show method statements, Show risk assessments or Show work-related activities on the action panel.

A pop-up is displayed listing all hazards / method statements / risk assessments or work-related activity types related to this particular order.

Changing the order type of an existing order

If you have the right authorization, you can change the order type of an existing order.

 You cannot change the order type of orders based on a standard order.

Procedure

1. Select the order whose order type you want to change.
2. On the action panel, click Change type.

From the **Change type** dialog box, select the relevant order type.

3. Click OK.

The order type is changed. Order data fields, order actions and status transitions will be changed accordingly (sometimes quite drastically).



For more information on the **Change type** action, refer to *Fundamentals*.

Making an order recurrent

You can make an existing order recurrent to save the effort of repeatedly adding the same order.

It is possible to repeat an order at regular intervals, for example:

- daily
- weekly
- monthly
- in the first week of each month
- repetition without a fixed cycle.

Procedure

1. Select the order you want to make recurrent.
2. Specify a start date-time for this order.
3. On the action panel, click Make recurrent.

The Schedule dialog box appears.

4. Select the required Frequency: Daily, Weekly, Monthly;

OR:

5. Select the Calendar option to repeat orders with irregular intervals and click the required dates.
6. Depending on the selected frequency, fill in the Period section.

You can either set a period manually or select a predefined one. If you set the period manually, select a date in Starts on and either select the number of recurrences in the Create recurrences field or enter an Ends on date.

7. In the Occurrences section, specify when you want to repeat the selected order and - if relevant - on which day of the week.
8. Select Save settings if you want to save your choices for later use. Previously saved choices can be retrieved by clicking Load settings.
9. Click OK.

Confirm the number of recurrences in the Question dialog box.

10. Click OK to proceed or Cancel if you want to modify the schedule.

After clicking OK, the order is made recurrent.



In months with fewer days than the specified value, the recurring order will be made on the last day of the month.



Note that the limit for the number of recurrences to be created is 200.

Repeating a suborder in recurrent orders

If you add a suborder to one particular order in a series of recurring orders, Planon ProCenter asks if you want to repeat this suborder for all the recurring orders.

Procedure

1. Select OK. The suborder is automatically added to all the recurring orders.

If you select **Cancel**, the suborder will be added only to that particular recurring order.

2. If you decide at a later stage that you want to repeat the suborder, select the suborder and click Repeat suborder within group. This will add a copy of the suborder to all the future recurring orders.
 - For all recurring orders, Planon ProCenter will automatically populate the Recurrence group field with the number and description of the original order.
 - All recurring orders will get the default initial status even if the original order has another status.
 - If the original order includes order line costs, these are also adopted for the recurring orders.



It is not possible to apply an SLA to recurring orders.

Modifying a recurring order

It is possible to modify a recurring order.

To modify a recurring order, proceed as follows:

Procedure

1. Retrieve the recurring order for the date from which a modification should be applied.
2. Modify the data for the (recurring) order as necessary.
3. Click Save. Planon ProCenter asks you if you want to modify future recurring orders.
4. Click Continue if you want to modify future recurring orders.

All future recurring orders will be modified.

5. If one or more fields of a particular order in a series of recurring orders are modified manually, Planon ProCenter displays a warning (per recurring order).
This warning shows the number and description of the recurring order and the fields that deviate from the original order.
6. Select the appropriate option on the warning message to proceed further. Note that any changes to recurring orders that were already saved will not be undone.

Adding order history manually

At Order details > History, it is possible to keep track of changes to specific order fields, in other words: maintain a *history* on orders.

You can add a history record *manually*, as described in this procedure.

Prerequisite

You must have the appropriate authorization and configuration to add history on orders.

Procedure

1. Go to Order details > History.
2. On the action panel, click Add.
3. In the Comment field, enter any comments you want to make on changed data for the selected order.
4. Click Save.

It is also possible to have field changes on orders logged *automatically*, which requires some field configuration. In the **Field definer** TSI, a functional application manager or a user with similar authorization can enable an automatic **History** option per individual order field. If you enable the automatic history for a field, any modifications in this field will be saved in a log file. The results of any field changes will be displayed on the **History** selection step.



For more information on changing field attributes, see **Field definer** .

Logging department history

You can keep track of changes made to **Departments** fields by enabling the **History** functionality. History includes the user who changed the value in a field, the old and new values of the field and the time and date at which the value was changed. You can select which data fields of a department you want to keep a history on. Your application manager can enable an *automatic History* option for individual fields belonging to departments in Field definer . Once this option is enabled, any changes to the field's

value are saved automatically. These changes can then be viewed on the **Departments history** selection step.



For details on enabling automatic history, see [Setting field attributes](#) in Field definer .

With the appropriate authorization and configuration, you can also *manually* add a history of changes to the selected department, via the action panel. Any comments you want to make on changed data for the selected department can be specified in the **Comment** field and subsequently saved.

Archiving orders

Orders that are completed can be transferred to the archive. You need special authorization to archive orders. You can only archive orders (of any order type) if they have been assigned one of the following statuses:

- **Administratively completed**
- **Canceled**

Procedure

1. In the elements list, select the order you want to archive.
2. On the action panel, click Transfer to archive.

The selected order is archived.

- Once orders are archived, they are *read-only*, unless the **Is read-only when archived** order setting in Field definer specifies otherwise.
- To archive groups of orders, use the **Action on selection** feature. For more information on using **Action on selection**, refer to Fundamentals > [Action on selection](#).
- Suborders of a standard order can be archived independently. When you view archived items, the archived sub-order will be displayed along with its main order. For more information on viewing archived orders, refer to [Show archived orders](#).

Retrieving orders from the archive

Depending on you order settings, you may be able to modify archived orders. If you want to make changes to archived orders, you must first retrieve them from the archive.

Procedure

1. Go to the Orders level.
2. On the elements list toolbar, click the Show archived items toggle button.

The Archive settings pop-up opens.

3. Select the From and To dates to enter the period for which the archived orders must be displayed.
4. In the elements list, select the order(s) you want to retrieve from the archive.
5. On the action panel, click Retrieve from archive.

The archived order is retrieved and displayed in the elements list when the Show archived items feature is disabled.

Adding linked requests

In a single step, this action enables you to:

- *create* a new request based on another request
- *copy* relevant data, as specified by you
- *link* the new request to the original request

For example in IT service management, if you want to create a request of the type 'change' and link it to an 'incident', this action will save you the trouble of manually adding a new request, entering the data and linking it to the incident.



This action is only available for the **Requests** order type.


Procedure

1. Go to Orders and select the request to which you want to add a linked request.
2. On the action panel, click Add linked requests. The Add linked requests dialog box opens.
3. In the Type field, select a request type from the list which is relevant to the new request you are adding. For example, 'problem', 'change' etc.
4. Select the check boxes to copy field content to the new request. The following field values can be copied:
 - Description
 - SLA service
 - Comment
 - Comments
 - Requestor
 - Department
 - Communication logs




The selected (user-defined) request, as well as the fields to be copied, are saved as user settings and will remain valid until you modify them again.

5. Click OK.
A new linked request is created.

 If you want to check whether a request is linked to another request, you can do so by clicking **Link related records** on the action panel. In the **Link related records** dialog box, any existing links are displayed in the **In use** section. Also, links can be added or removed here. The linked records are displayed in the **Related records** field. If you set **Include archived records** in Field Definer to **Yes**, archived records are also included in the list and denoted by a check mark. For more information on this setting, see *Field Definer > General order settings*.

Major and related requests

If the service desk receives multiple similar requests, the service desk manager can designate one of the incidents as **Major** request and link all similar requests to this major request. This will enable you to keep related requests together and address them at the same time. Once a request is linked to a major request, any changes (fields / statuses) on the major request are carried through to the related requests.

 Changes made to suborders, communication logs and other order details are not carried through from the major request to the related requests. You cannot create major or related requests for standard orders.


Major requests can be characterized by their impact on a significant number of customers/users. For example, a request about failing network communication may be reported by multiple employees, because the problem is critical and has a high priority. It will be easier for the responsible department to work on a single request with linked similar requests, since they will be working on resolving the same problem.

Creating a major request

Procedure

1. Go to Orders.
2. Select a request that you want to promote to major request.
3. In the data panel, select Yes in the Major? field.
4. Click Save.

The selected request is designated as major request.

 The major and related requests can be created for every user-defined business object created for the **Requests** system type.


The **Related requests** field on the major request displays all the linked requests associated with this major request.

Copy from major request

Procedure

1. Select a major request from the list.
2. On the action panel, click Copy from major request.
3. Click Save.

A new request is created which is automatically linked to the selected major request.

 The **Copy from major request** action is only available if the major request still is in its initial status and not archived nor canceled.

Linking similar requests to a major request

Procedure

1. Go to Orders.
2. Select the request(s) that you want to link to the major request.
3. On the action panel, click Link to major request.


 The action **Link to major request** is only available for non major requests and the action **Unlink from major request** is only available for linked/related requests.

A warning is displayed.

4. Click Continue on the warning.


The Link to major request pop-up opens. The pop-up only displays requests of the same user-type in the selection.


5. Select a major request from the list.

 There is an option **Show completed request** to display completed requests in the list. Canceled major requests are not displayed.

6. Click OK.

After linking, the major request is automatically displayed in the Major request field of all linked requests.

 Once a request is linked to major request, any fields other than **Requestor** and **External requestor** can no longer be changed, as they are taken over from the major request. The **Standard order** field is not taken over from the major request and is not kept in sync.

 You can still add suborders, communication logs and any other order details independently, for both major and related requests. They will not be taken over from the major request.

To unlink a request from a major request, click **Unlink from major request** on the action panel.


 You can link or unlink multiple requests using the **Action on selection** option.

Reassigning rejected requests / orders

If a service request, work order, move request, move order or reservation is rejected, it is convenient if it is automatically reassigned to the Service desk. Not only does this avoid manual intervention, but also ensures that the request / order will be noticed and reassigned again.

Example: a service request is created for first line support. First line support moves the request to second line support for further processing. It may happen that second line support is not the right assignee (**Trade**) for the request. If second line support rejects the request, it should automatically be moved back to first line support.

First line support can reassign the order / request by selecting another trade in the **Reassign to** field.

 For more information on this field, refer to [Order fields](#).

Precondition: your application manager has configured statuses in **Field definer** that can be used to reject the order.

 For more information, refer to *Field definer > General order settings*.

Calculating the Requested completion date

The **Requested completion date** of an order is calculated from the interval between the priority and the moment of starting an order.

The following fields determine the moment an order is started:

- The **Start date-time** in case of suborders under a Reservation / Planned maintenance orders / Recurring orders.
- The **Planned start date-time** in case of orders generated by the Service Scheduler.
- The **Reported on** (InsertDateTime) or (if populated) **Original reporting date-time** in any other case.

The following scenarios explain how a company calendar is applied depending on the interval for the priority:

- If the priority interval is in years/months/weeks, non-working days and non-working hours (both normal and deviating) are not taken into account.
- If the priority interval is in days, only non-working days (both normal and deviating) as defined in the applicable calendar are taken into account.

Note

If the date-time of the field used for calculating the **Requested completion date** is outside working hours, the first possible date-time within working hours on a working day is used for the calculations.
Similarly, if the calculated requested completion date is outside working hours/days, then it is set to the first possible date-time that is within working hours on a working day.

- If the priority interval is in hours, the calculation is similar to a priority in days. However, non working hours (both normal and deviating) as defined in the applicable calendar are taken into account as well.
- If the priority interval is in minutes, non-working days and non-working hours (both normal and deviating) are not taken into account. This is because for this priority, the work is considered to be so urgent that it should be carried out irrespective of working hours/days.

Note

If an order is resumed from an 'On hold' status, the **Requested completion date** is recalculated, even if the SLA is not applied.

Example:

Calendar: working hours Mon-Fri 9:00 - 17:00

Reported on (InsertDateTime)	Priority	Requested completion date-time
Fri 3/4/2020 16:00	120 min	Fri 3/4/2020 18:00
Fri 3/4/2020 16:00	2 hrs	Mon 6/4/2020 10:30
Fri 3/4/2020 16:00	1 day	Mon 6/4/2020 16:00 (working hours are not taken into account)

Reported on (InsertDateTime)	Priority	Requested completion date-time
Fri 3/4/2020 16:00	24 hrs	Wed 6/4/2020 16:00 (working hours and working days are taken into account)
Fri 3/4/2020 18:00	120 min	Fri 3/4/2020 20:00
Fri 3/4/2020 18:00	2 hrs	Mon 6/4/2020 11:00
Fri 3/4/2020 18:00	1 day	Tue 6/4/2020 09:00
Fri 3/4/2020 18:00	1 week	Fri 10/4/2020 18:00 (working days are not taken into account)
Fri 3/4/2020 18:00	7 days	Tue 14/4/2020 18:00 (working hours are taken into account)
Fri 3/4/2020 18:00	1 month	Sun 3/5/2020 18:00

Note


The above scenarios also apply to the calculation of **Requested response date-time**, **Requested date-time to attend** and **Requested date-time to fix**, except that the interval defined in these fields of the SLA is used to determine the period.

Tip

For more information on SLAs, refer to *SLA Management*.


Working with questionnaires

The **Questionnaire** tab is available for orders based on a standard order with a questionnaire linked to it.

 For more information on linking questionnaires to standard orders, see [Linking questionnaires to standard orders](#). For more information on creating questionnaires, see [Working with questionnaires](#).

Procedure

1. Select an order for which a questionnaire is defined. The Questionnaire tab displays question(s) with answer options.

 For Sustainability audits: if the **Audit?** field is set to **Yes** in Questionnaires, additional fields such as **Proof of evidence** and **Additional comment** are displayed. Selecting **Yes** in the **Proof of evidence** field indicates that additional information/documents are available as communication logs.

2. Select the appropriate answer option for the questions in the questionnaire.

If you wish to skip answering a question or reconsider a previously provided answer to review it later, you can use the **Earmarked for revision?** field. Set this field to **Yes**. The **Earmarked for revision?** field is also available on the **Answer lines** selection step. Here you can filter on this field to quickly find the questions you still need to review and answer.

Depending on the answer(s) selected and the score assigned for each answer in Questionnaires , the question(s) gain score. The **Score** field displays the total score of a question.

3. Click Save.
You have answered the questionnaire.

The screenshot shows a 'Questionnaire' tab with the following details:

- Navigation: General, Communication logs, Audit info, **Questionnaire**
- Section: BREEAM - International Building Management (Score: 11.00, Max. score: 206.00, Percentage: 5.34%)
- Sub-section: > MANAGEMENT 11.00/40.00 27.50%
- Question: QUESTION: 01MAN001 Has a building user guide been prepared and has it been made accessible to all the occupying organization's staff?
- Options:
 - Question not answered
 - Don't know
 - No
 - Yes
- Score: 2
- * Proof of evidence: Yes No

Legend

A	Total score	Sum of scores of questions under a questionnaire.
B	Max. score	The maximum allowable score for the questionnaire.
C	Percentage of score	Percentage of total score in maximum score.

If a questionnaire has sub-questionnaires, the score of all the questionnaires is aggregated. On any level of the questionnaire hierarchy, a questionnaire will get a score that is the sum of all its linked questions and the scores of all questionnaires at a lower level in the hierarchy.

The scores and percentages on the **Questionnaire** tab can be displayed in reports generated from Planon ProCenter .

The following example explains the calculations of scores and percentages that are displayed in the **Questionnaire** tab on orders.

For example,

- A questionnaire on sustainability of a building has sub-questionnaires on Energy, Water and Waste with different questions.
- Each question answered has a score and maximum score.
- The maximum score can be provided on location or when defining a question.
- Percentage of the score in the Maximum score value and Weight percentage columns are calculated to analyze the scores drawn from the questionnaire.

	Questions	Score	Maximum score value	% of Score in Max. score value	Weight %
Energy					
	Q1	3	6	50.00%	
	Q2	1	4	25.00%	
	Q3	4	8	50.00%	
	Aggregated	8	18	44.44%	22.22% (50% weight %)
Water					
	Q4	3	3	100.00%	
	Q5	4	5	80.00%	
	Aggregated	7	8	87.50%	26.25% (30% weight %)
Waste					
	Q6	4	5	80.00%	
	Q7	6	6	100.00%	
	Aggregated	10	11	90.91%	18.18% (20% weight %)

	Questions	Score	Maximum score value	% of Score in Max. score value	Weight %
Total aggregated		25	37	67.57%	66.65%



The aggregated score is calculated by taking the lowest value of the **Score** field or **Maximum score value** (in Questionnaire Manager).



The answers to a questionnaire can be of different types, for example 'date', 'integer', 'text'. In reports, these different answer types can be displayed in one single column via the **Answer** field. Note that the **Answer** field stores the data as it is. Date (time) fields, decimal fields, and translated name fields are not converted to the country-specific format of the logged-in user viewing or reporting on the field. If you want to see the information in the country-specific context, please check the original fields.

Working with maintenance orders in Work Orders

In **Maintenance Manager** you can generate maintenance orders per maintenance activity or per cluster of activities in a maintenance plan. After order generation, the maintenance orders including order lines, estimates and check list items are automatically added at **Orders** and **Order details** in Work Orders . In Work Orders you can monitor the progress of these maintenance orders, add suborders and change the order status.

If you accept an order, it does not mean that any corresponding activities are set to **In progress**. The **In progress** status has to be selected per individual activity.

The corresponding maintenance activities, from which the maintenance orders have been generated, can be viewed at **Order details** > **Maintenance activities**.

Any checklist items that belong to a maintenance order are available at **Order subdetails**, where they can be used to generate forms (for example job tickets) with **Report Manager**.



For more information on working with **Maintenance Manager**, refer to *Maintenance Manager*. For more information on working with **Report Manager**, refer to *Report Manager*.

Viewing a maintenance activity's health and safety information

In the Work Orders TSI , you can view the health & safety information that applies to a selected maintenance activity. The following actions can be used for this purpose:

- **Show hazards-** displays applicable hazards for this maintenance activity.

- **Show method statements-** displays applicable method statements
- **Show risk assessments-** displays applicable risk assessments (questionnaires)
- **Show work-related activities-** displays the anticipated hazardous activities



For information on configuring health & safety data on orders, see the *Health & safety* user documentation.

Procedure

1. Go to Orders.
2. Select the relevant maintenance order (ppm order).
3. Go to the Order details > Maintenance activities step.
4. Select the maintenance activity for which you want to view health & safety information.
5. Depending on which health & safety information you want to view, click Show hazards, Show method statements, Show risk assessments or Show work-related activities on the action panel.

A pop-up is displayed listing the hazards / method statements / risk assessments or work-related activity types related to this particular maintenance activity.

Applying an order flow to orders

You can apply a predefined process flow to orders, by linking a standard order on which such an order flow is defined.

Order flows can be viewed on the **Order details > Flow objects** step.

Prerequisite

- To apply an order flow to an order, you must first define the order flow (flow objects and sequence flows) on a standard order in Supporting data .



For more information on configuring order flows, refer to Supporting data > Order flow.

Procedure

1. On the Orders level, select the (main) order to which you want to apply an order flow.



It is not possible to copy or repeat an order with an order flow.

2. Apply a Standard order. For more information, refer to Adding an order based on a standard order.

If an order flow is defined for the selected standard order, the message asking which suborder(s) must be taken over, is not displayed. This is because suborders are created at the time their tasks are activated in the order flow.



A task (flow object) in an order flow is equivalent to a suborder on the main order.

3. Click OK.

- On saving, the order flow is copied from the standard order and the **start event** of the order flow is set to **Completed**, which automatically activates the successor in the order flow.
If the next flow object is a task, a suborder based on the standard suborder of the task is created.



If you clear or change the applied standard order, then all the existing flow objects and sequence flows are deleted. Any existing suborders created from the order flow are NOT deleted.

- To see the suborder on the main order, press F5 or refresh. This is needed if the **Show related orders on update** feature is activated.
- When the **suborder** is set to **Completed**, the corresponding task in the order flow is also completed and the next flow object is initiated in the sequence flow. However, if a suborder is canceled or deleted, the flow may be disrupted and the entire order flow may get stuck. Hence, a flow issue is created and the cause of the issue is registered. The coordinator/supervisor can interfere to restore the order flow manually.
- If the next flow object is one of the gateways, the following process is applied:
- A **Parallel gateway** is activated only when all the incoming flows are completed. The gateway then activates all its outgoing flows.
- If an **Exclusive gateway** is activated, the question as defined on the gateway is evaluated. If an answer is given, then the gateway is completed and the outgoing flow that matches the answer given is activated. All the other (outgoing) sequence flows are canceled.
- If no single outgoing flow could be activated (e.g. because no answer was given yet), a flow issue is registered. The coordinator/supervisor can interfere to restore the order flow manually.
- When an **Inclusive gateway** is activated, the question as defined on the gateway is evaluated. If an answer is given, then the gateway is completed and all outgoing flows that match the selected answer options are activated. All the other (outgoing) sequence flows are canceled.
- If no outgoing flow is activated (e.g. because no answer has been given yet), a flow issue is registered. The coordinator/supervisor can interfere to restore the order flow manually.
- The order flow continues its flow until all the sub orders in the main order are completed and all the tasks in the flow are accomplished. The order flow is completed once the last end event is completed.



If an answer is changed after its gateway is completed, it will result in a flow issue as the outgoing flows corresponding with the old answer have already been activated (this applies to both inclusive and exclusive gateways).

Creating projects

It is possible to create order-based projects in Work Orders .

Order projects may include a variety of grouped tasks: from technical activities such as renovations, to planning an annual conference including reception, lunch, presentations and drinks afterwards.

Orders of various types - work orders, requests, reservations, requisitions - can be added directly to an order project. You can also link order projects later, if required.

Procedure

1. Go to Properties and select the relevant property(ies).
2. Descend to Components > Projects.
3. Click Add on the action menu.
4. Enter the project data for the new order project in the data section.

You can now add orders of various order types (requests, work orders and requisitions) to this project.

5. Go to the Orders and add the relevant order(s), together with any suborders.

Linking existing orders to a project

It is possible to link an existing order to a newly created order project.

Procedure

1. Go to Orders, select the required order.
2. In the Project field, select the project that you want to link to the order.
3. Click OK. The order will now be linked to the selected project.



If you intend to carry out several (nearly) identical projects - for different properties, for example, copy the project data to a new project. Change some of the values of the copied project, if necessary.

Setting a reference date for a project

If you have the appropriate authorization, you can retrieve the active order projects by using a reference date. By setting a reference date, your elements list will be filtered by this date and only the active order projects will be displayed.

Procedure

1. In Work Orders , go to Components > Projects.
2. Click Reference date on the Planon header. The date picker window appears.
3. Select a reference date. By default, the system date is the reference date, but you can select any other date from the calendar.
4. The elements list is then filtered on this date. Only order projects that are valid on the reference date are displayed.

When you deactivate the reference date, all order projects are displayed.

Logging order history

You can keep track of changes made to **Order** fields by enabling the **History** functionality. History includes the user who changed the value in a field, the old and new values of the field and the time and date at which the value was changed. You can select for which data fields of an order you want to log history. Your application manager can enable an *automatic History* option for individual fields belonging to orders in Field definer . Once this option is enabled, any changes to the field's value are saved automatically. These changes can then be viewed on the **History** selection step.



For details on enabling automatic history, see [Setting field attributes](#) in Field definer .

With the appropriate authorization and configuration, you can also *manually* add a history of changes to the selected order, via the action panel. See [Adding order history manually](#).

Working with standard orders

In Planon ProCenter , standard orders are a kind of 'template' orders that considerably speed up the process of feeding new orders into the system. It may be practical to use standard orders for frequently recurring requests, tasks or activities.

If you use standard orders for adding new orders, much of the order data is automatically populated. Standard orders can include a number of standard suborders, keywords, questions, estimates, costs and lines (order lines, requisition lines or purchase order lines).



For information on creating and maintaining standard orders, refer to Supporting data .

Adding an order based on a standard order

You can add an order based on a standard order either by:

- selecting a standard order via the **Add standard** option on the action menu.
- or
- by adding an order and subsequently selecting a standard order on the **Standard order** field.



You can add a standard suborder to your main order by using the **Add standard sub** option on the action panel.

Procedure

1. Go to Orders.
2. On the action panel, click Add standard.
3. The Standard orders dialog box opens.
4. Select a standard order from the list. Use the filter bar at the top of the dialog box to filter out relevant standard orders. See Filter options in the Standard order dialog box for more information.
5. Click OK.
6. If the standard order contains any suborders, a dialog box appears in which you can select the suborders that you want to include in the new order. To include all suborders, select the Select all checkbox. If you deselect this checkbox, none of the suborders is selected. The setting of this checkbox is retained per user.



You can also use the **Select all** and **Deselect all** buttons.

Question



Question

Which suborders should be added?

Select all

- Add sub: MO002_01, Deliver boxes
- Add sub: MO002_02, Clean area
- Add sub: MO002_03, Change nameplate
- Add sub: MO002_04, Prepare workplace
- Add sub: MO002_05, Update phone system
- Add sub: MO002_06, Prepare & issue keys/access cards
- Add sub: MO002_07, Update CAD drawings/Planon data

Select all

Deselect all

Proceed

Cancel

7. Click Proceed.
8. A new order is added, whose data fields are filled with data from the standard order.
9. Enter any additional data you may want to add in the relevant fields, or modify the data you may want to change and click Save.

You have now added an order based on a standard order.
This order has the same status transitions and other order related functionality as a regular user-defined order of the same order type.



If you add an order that is based on a standard (sub)order with order lines, an **'Order lines'** dialog box will appear after you click **Save**. In this dialog box, you can change the number of items to be ordered, or you can edit the order data. If you enter a quantity of zero, the line will not be created. Only lines with a quantity greater than 0 will be created (applies to order lines, requisition lines and purchase order lines).



Depending on your system configuration, adding or modifying certain default data (for example a default order group) may have an impact on other data. As with regular orders, the use of standard orders may trigger field changes, causing field values to be cleared or overwritten. Standard orders have their own sequence of field changes.



For general information on field changes, refer to [Orders and Field Changes](#).
For more information on default data, refer to [Order Preferences and Defaults](#).

Filter options in the Standard order dialog box

The filter options in the **Standard order** dialog box help you to quickly select the right standard order. The **Standard order** dialog box can include different filter options, depending on:

- The method you are using to add an order based on a standard order (refer to: [Adding an order based on a standard order](#)).
- Whether a property has been selected on the **Properties** selection level or whether the **Property** field has a value.
- Whether an order group has been selected on the **Components** selection level or whether the **Order group** field contains a value.
- Whether a field value is entered in Asset, Space, Requestor or **Trade**.
- Whether suborders are added that are based on a standard order. In that case, special filter options are displayed.
- Whether you add a *request* based on a *standard request*. In that case, there is an extra filter option in the drop-down box for key words and an extra check box to filter out standard requests to which an internal SLA applies.



Filtering based on property, space, asset and requestor is done using the standard order's applicability. For more information on standard order applicability, refer to Supporting data > [Defining a standard order's applicability](#).

The following example is about the filter options that are displayed in the **Standard orders** dialog box.

Example

On the **Orders** selection level, you add a request based on a standard request by selecting the **Add** option in the action menu and selecting a standard request via the **Standard order** field. The **Property** and **Order group** fields of the newly added request are filled. The following filter options are now displayed as check boxes in the dialog box:

Standard orders



Assessment d ⌵ = ⌵ Search... [] [X] [+] [Q]

- Applicable for property: Columbus Square
- Applicable for order group: 01, Hard FM Services
- Display suborders

U ^	Code	Description	A...
	MM001	Request MM	
	FM026	Put up picture(s)	
	MM025	Window broken	
	MM051	Lift not working	
	MM064	Put up key cabinet	
	MM066	Repair/replace broken light switch	
	MM067	Too hot / too cold	
	MM068	Leaking tap	
	ALL 01	01 WELLS	

OK Cancel

You can select multiple options.

Order preferences and defaults

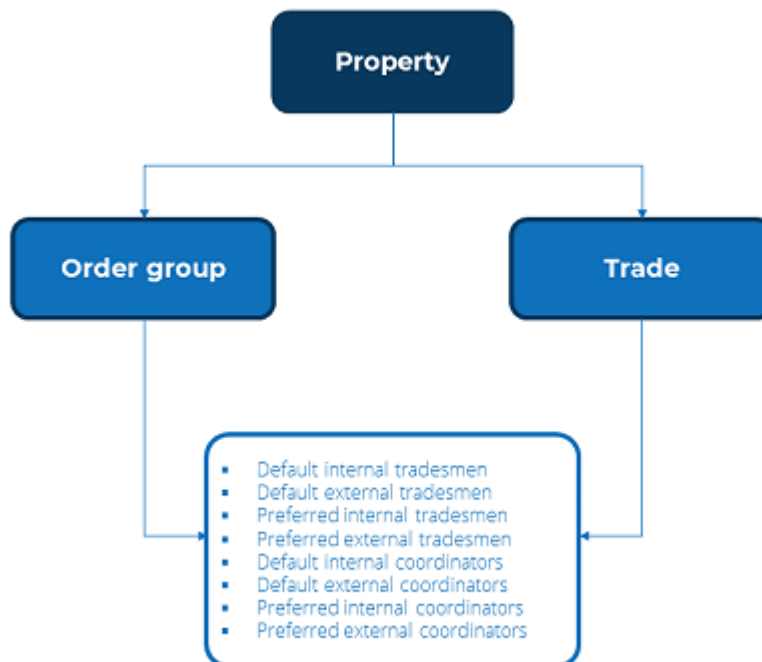
In Planon ProCenter , the functional system administrator or someone with similar authorizations can specify which tradesmen or coordinators, either internal or external, are presented to end users in dialog boxes or as default values when creating orders. This will considerably simplify making selections for end users.

Basically, a distinction is made between preferred and default tradesmen and coordinators per property, trade and order group.

Preferences are used to create pre-filtered lists of tradesmen and coordinators in dialog boxes that can be opened from within fields, e.g. the **External tradesperson** field.

Defaults are values that will be specified automatically on the data tabs of the order, as soon as a specific property and order group or trade - for which these defaults have been registered - is selected for the order.

Preferred or default tradesmen and coordinators are linked to either a trade or an order group. Additionally, combinations of preferences or defaults can also be linked to a specific property. The relations between the various elements are illustrated in the following image.



Working with preferences

If preferred addresses (external tradespeople and coordinators) and/or preferred persons (internal tradespeople and coordinators) are linked to a property, order group or trade, a pre-selection will be offered in the pick list of the fields in which you can select an address or person on adding an order.

Working with defaults

You can define default values for coordinators/tradespeople, based on the default settings for the **Trade** or for **Order group** business objects.

Settings concerning preferred or default tradespeople and coordinators per property, trade or order group can be created in **Supporting data**, by system administrators.



For more information refer to Supporting data > *Default settings*.

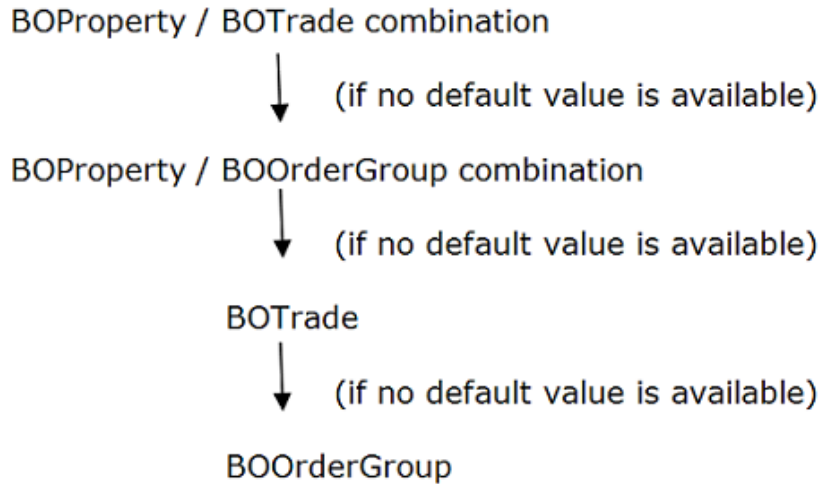
The default values of External/Internal coordinators/tradespeople also depend on the **Business object settings > Default addresses/persons priority** setting in **Field definer**.



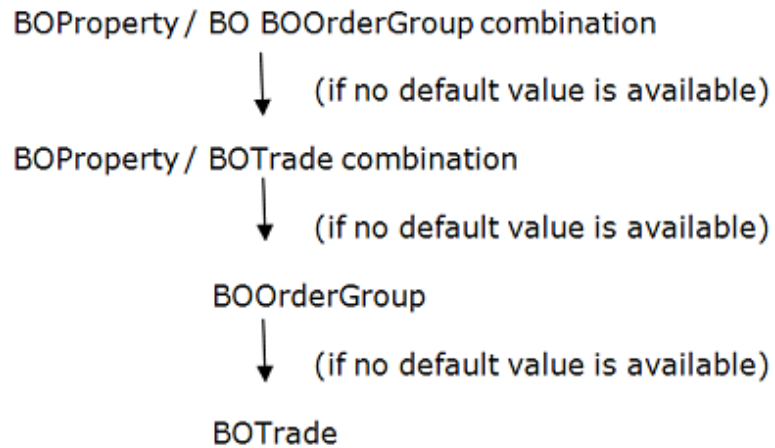
For more information, refer to Field definer > **Working with defaults**.

In Service Manager, when adding or modifying orders, default internal/external coordinator/tradesperson field values are searched in the following sequence:

1. If an order is linked to a contract, the defaults defined for the contract line/contract are used first. If the Contract line field on the order does not contain a value, the defaults defined in the contract are used.
2. If no default value is available for the External tradesperson field, the default defined for the asset is used.
3. If no External tradesperson is available, use the address that is connected to the contracting party of the granting contracting party of this contract.
4. If in **Field definer** > Order settings > General tab, the *1, Trade / Order group* option is selected, the default settings are assigned in the following order, depending on the availability of the default values in the business object combinations:



5. If in **Field definer** > Order settings > General tab, the 2, *Order group/Trade* option is selected, the default settings are assigned in the following order, depending on the availability of the default values of the business object combinations:



Working with order lines

If you want to purchase or request items for the selected order, you can add order lines to different order types.

See the links below for more information:

- [Adding order lines](#)
- [Adding requisition lines](#)
- [Adding purchase order lines](#)



Creating many order lines to a (sub) order will have a negative impact on the performance in processing such an order. The amount of order lines from which the performance will be reduced as well as the impact on the performance depend on your local infrastructure.

Adding order lines

Procedure

1. Go to Orders.
2. Select the order to which you want to add order lines.
3. Go to Order Details > Order lines.
4. Click Add on the action panel.
5. In the data section, register the required data.

For field information, refer to [Order lines data](#).

6. Click OK. An order line is added.

Adding requisition lines

If you need any items from the product catalog for the execution of an order (Requisition, Work order or Planned maintenance order), you must add requisition lines for these items. The procedure is identical to the one for adding order lines. For more information, refer to [Adding order lines](#).

Rules that apply to Requisition

- You can only add or delete requisition lines while the product requisition is in the **Reported** status.
- Once a requisition is set to the **Confirmed** or **Accepted** status, you can no longer change the product or the quantity specified in the requisition lines.

- If a requisition is set to the **Accepted** status, the related requisition lines are also automatically moved to the **Accepted** status. You can no longer add additional requisition lines to the requisition. Purchase suggestions or stock requests are created.
- For a discontinued stock item, the requisition line will not be accepted if the requested quantity of stock items is greater than the available stock, because not all requested items can be delivered.
- You cannot cancel a requisition line if it has one or more issuing lines.

Rules that apply to **Workorder** or **Planned maintenance order**

- You can add additional requisition lines to a main order in all statuses, except **Technically completed**, **Administratively completed** or **Canceled**.
- If a work order or planned maintenance order is set to **Accepted**, the status of the related requisition lines will remain unchanged.
- If the requisition line is set to **Accepted**, you can no longer change the product or the quantity specified in the requisition lines. Purchase suggestions or stock requests are created.
- When an order is set to the **Planned** or **Assigned** status, all the related requisition lines will be accepted.
- An automated process will start to determine the most suitable distribution point, based on the internal tradesperson or the property filled in on the order. When the requisition line is moved to **Accepted**, the choice of distribution point is finalized.
- You cannot change the status of an **In progress** requisition line to **Reported** or **Canceled** when the related purchase suggestion is being processed.
- You can only delete requisition lines that are **Reported** or **Canceled**.
- A requisition line cannot be set to **Accepted** if the stock item is discontinued or if it is archived at the distribution point.
- You cannot cancel a requisition line if it has one or more issuing lines.

For a description of the fields specific to requisition lines, refer to [Requisition lines data](#).



For work orders and planned maintenance orders, the **Issuings** and **Issue returns** steps are available on the **Order details** level. You can check the generated issuings and also perform a **Direct issue** action for the stock. For more information on issuings, issue returns and direct issuing of stock items, refer to [Stock](#).

Including an estimate for a requisition

After you have created a requisition and added the required requisition lines, you can add an estimate to it.

Procedure

1. Go to Order details > Order lines.
2. On the action panel, click Include order line(s) in estimate. An estimate is generated automatically as soon as the requisition is set to the Confirmed status.

For more information on registering order costs, refer to [Cost Management](#).

If there are requisition lines as well as order lines, they are also included in the estimate. If there is an existing estimate based on order lines only, click the action **Include requisition lines in estimate** to create a new estimate that includes both requisition lines and order lines.

Adding purchase order lines

After you have created a purchase order, you have to add one or multiple purchase order lines. For each item you want to order, you can add a purchase order line to the purchase order. For example, if you need to order 50 boxes of printing paper, you add 1 purchase order line stating the purchase item (printing paper) and the quantity (50). Other relevant data such as the unit, prices and tax rates are populated automatically on selecting the purchase item.

For information on purchase order lines fields, refer to [Purchase order lines data](#).

The procedure for adding purchase order lines is identical to adding order lines. For more information, refer to [Adding order lines](#).

Cost management in Work Orders

Order costs, internal or external, can be registered in Planon ProCenter from the time you start receiving quotations till the time you start paying your bills (invoices).

Cost related data can be registered at the **Order details** level.

See the links below for more information:

- [Cost overview](#)
- [Standard cost category and standard cost type](#)
- [Adding quotations](#)
- [Adding estimates](#)
- [Adding actual costs](#)
- [Deleting order costs](#)
- [Adding labor hours](#)

Cost overview

On the **Order details** level, you can find an overview of the costs linked to an order. Each of the cost-related selection steps, **Estimates**, **Actual costs** and **Labor hours**, displays the total costs (including and excluding VAT) on that step and a complete overview of all costs.

Total estimated costs		Order costs overview				
Description	Costs	Surcharge	Labor hours	Hours x tariff	Total costs excl.	Total costs incl.
Estimates	€ 70.05		0	€ 0.00	€ 70.05	€ 84.06
Actual costs	€ 70.05	€ 0.00			€ 70.05	€ 84.06
Labor hours			2	€ 80.00	€ 80.00	€ 96.00
Balance	€ 0.00	€ 0.00	-2	€ -80.00	€ -80.00	€ -96.00

If there are suborders with associated costs, you can select the **Show suborder details** button in the element list toolbar to display the totals of all suborders in the cost




spreadsheet:

The costs are displayed as follows:

- The **Total [...] costs** tab displays the total costs of either the *active estimate*, the *actual costs* or the *labor hours*. If you have activated a filter, this filter is also applied to this tab.
- The **Order costs** overview tab displays the total actual costs, the total estimated costs and the total labor hours costs of the order(s) you selected on the **Orders** selection level.


Any activated filters will not be applied to this tab.

 You can also view a cost overview on the **Orders** selection level, by clicking **Show cost overview** on the action panel.


Standard cost category and standard cost type


Standard cost categories and types define FM services and standardize subsequent classifications, enabling the costs of facilities and activities to be specified uniformly. They also enable relevant calculations and information to be generated, and consequently facilitate a uniform comparison of FM costs.

In Planon ProCenter you can use standard cost categories and standard cost types to specify and classify your costs. Everywhere in Planon ProCenter where order costs are registered, there are two standard cost fields available, in which costs can be allocated according to function (=cost category) and according to type (=cost type).

 A planned maintenance order's **Standard cost category** and **Standard cost type** are taken over from the standard order when a standard order is applied and the information is filled in there. If the standard cost category or standard cost type are not filled in on the standard order, the information is taken over from the order group of the planned maintenance order.

Authorized users can maintain standard cost categories and standard cost types in the Supporting data navigation group, where they can define and maintain the necessary categories and types.

 In **Report Manager**, you can design and generate special cost standards reports which enable you to retrieve a cost overview per cost category and per cost type.

 For more information on creating report definitions and generating reports, see [Report manager](#).
For more information on standard cost settings, see [Costs - order settings](#).

Adding quotations

When your organization receives a quotation, you can register the quotation data.

Procedure

1. Go to Order details > Quotations.
2. Click Add on the action menu.
3. Enter the required information in the data section. For the field information, refer to Quotation data.
4. Click Save. A quotation for the selected order is registered.
5. Click Create estimate on the action menu, to transfer the quotation data to the Estimates selection step.

Create estimate can only be used if the fields **Amount** and **Date of receipt** are populated and saved.

Adding estimates

The **Estimates** selection step is used to enter the estimated costs on an order. Several estimates can be linked to an order, but only one estimate is actually used in subsequent calculations.

Procedure

1. Go to Order details > Estimates.
2. On the action menu, click Add.
3. Fill in the required information in the data section. For the field information, refer to Estimates data.
4. Active estimates are added to the selected order. The Total estimated costs tab displays the data that have been entered for the estimate on all cost related steps.

Once all internal and external costs are known, these can be entered on the Labor hours and Actual costs selection steps. Refer to Adding actual costs and Adding labor hours.

Adding actual costs

As soon as invoices from external tradespeople are received, you can start registering the actual order costs on the **Actual costs** selection step.

You can also add costs that are charged by other departments or business units within your own organization.

Multiple actual costs lines can be added to a single order.

Procedure

1. Go to Order details > Actual costs.
2. Click Add on the action menu.
3. Enter the required information in the data section. For the field information, refer to Actual costs data.
4. On the action menu, click Include order line(s) in actual costs or Include order line(s) in estimate options to transfer the total costs of an order line to the order estimates or actual costs.
5. Click Save.

The actual costs are added.

Estimated costs vs. Actual costs

An order can have estimates and actual costs.

When an order is linked to a budget, the estimate and the sum of the actual costs must have the same sign (+ or -). If you want to adjust the actual costs, you can add costs with an opposite sign as long as the **Total actual costs** still have the same sign as the estimate (see case 3).

	Estimated costs	Actual costs	Total actual costs	Allowed?
1	1000	800	800	Yes
2	1000	-800	200	No
3	1000	800 -200	600	Yes

If the order is not linked to a budget, these signs can differ:

	Estimated costs	Actual costs	Total actual costs	Allowed?
1	1000	800	800	Yes
2	1000	-800	200	Yes
3	1000	800 -200	600	Yes

Deleting order costs

If an order is canceled, the costs associated with the order are no longer valid and can be deleted.

Deleting order costs is only possible for orders of the *work orders* type. For *reservations* there is no option of deleting the costs upon cancellation.



If a cost line of an order line is deleted, the budget used for the work order is recalculated and the amount is credited back to the budget.

Prerequisite

In **Field definer** > **Business object settings** > **Costs**, the setting **Remove order cost on cancellation** must be set to **Yes**.

Procedure

1. Select a work order with order lines. For example, a catering order with order lines.
2. On the action menu, click Include order line(s) in actual costs. You can see the total costs of the order.
3. Set the order to the Accepted status.
4. Click Canceled, if the order needs to be canceled.

5. A message appears asking if you want the order costs to be deleted for the canceled order.
6. Click Yes to delete the order costs.

Adding labor hours

You can add **Labor hours** to specify the costs of internal labor hours that are spent on a particular order. If a tariff group is specified for labor hours, Planon ProCenter will automatically calculate the costs involved, based on this tariff group information.

The labor hours information can be added at Order details > labor hours.

On the **Orders** selection level, you can also quickly add labor hours on the order itself, using the **Add labor hours** action on the action panel.

For information on adding orders, refer to [Adding orders](#).

For information on the labor hour fields, refer to [Labor hour fields](#).

Budget data on orders

It is possible to retrieve the latest budget data on the cost-related steps **Quotations**, **Estimates**, **Actual costs** and **Labor hours** on the **Order Details** selection level.

This can be done by clicking **Show budget**  on the action menu.

The **Budgets** dialog box will open, displaying read-only, up-to-date budget information on the budget that is linked to the selected order.



For more information on working with budgets, refer to [Budgets](#).

Generating forms

If your organization uses the Report Manager, various forms can be created for orders, such as job tickets, request confirmations, internal or external order forms and quotations. All kinds of registered order data can be included in a form, for example a description, number, start date, space, comment or tradesperson.

Based upon a template form, a form can be generated for a specific order and subsequently be printed, mailed or attached to this order as an order document.

See the links below for more information:

- [Creating a template form](#)
- [Adding a form to an order](#)
- [Previewing forms](#)
- [Emailing a form](#)
- [Editing an email](#)

Creating a template form

In a template form you add data that is required for generating an order form. For example: the addressee and the mail merge report to be used.

Prerequisite

- A mail merge report must be defined in Report Manager. This mail merge report must be created using a template file in any of the Planon ProCenter supported formats, such as, .html, .rtf, .doc or .docx, containing the merge codes.



For more information, see *Report Manager* ([creating mail merge report definitions and template files for forms](#)).

While creating a template form, you can also attach up to three files to be sent with the email by default on completion of a particular type of request. For example, a service desk manager can create a template form with up to three default attachments that will be sent with an email on completion of the request made by the user.

Procedure


1. Create a mail merge report via the Report action in Work Orders .




For more information on creating mail merge reports, refer to *Report Manager*.

2. Click Add form on the action panel. The Forms dialog box appears.

3. Click Add on the action panel.

 You can also copy the existing form using the **Copy** action on the action panel.

4. Complete the fields in the dialog box. For more information, refer to Forms data.
5. Click Save. A new template form is created.


 The values specified in the **Addressee** and **Copy to** fields are derived from the corresponding order. For example, if the addressee is an internal tradesperson, the **Internal tradesperson** field on the **Miscellaneous** tab of the order should contain a value, otherwise you cannot email the form.

Retrieving a form for an order


Procedure

1. Go to Orders, select the order for which you want to retrieve a form.
2. On the action panel, click Add form.

The **Forms** dialog box opens, displaying all forms that are available to the selected order. If the list is empty, click **Show all template forms** to see more forms.

 In the **Add form** dialog box, if the **Show all template forms** check box is selected, the setting will be remembered (per user) and will be reflected when you open the dialog box. Clearing the user settings will discard these settings.

The forms displayed in the elements list of the **Forms** dialog box also depend on the status and order type of the linked order and on your personal authorization.

 This dialog box can be displayed automatically after an order is transferred to a particular status, as defined in Field definer . For more information, refer to Field definer > *Enforcing automatic form printing after an order status transition*.

Previewing forms

You can preview a form or job ticket. Forms with .html templates are opened in a browser. Forms with any other template, for example .doc/.docx/.rtf, are opened in MS Word or any other application associated with the file extension.

Procedure

1. In the **Forms** dialog box, select the form you want to preview. For more information on retrieving forms, refer to Retrieving a form for an order.
2. On the action panel, click **Preview & print**.

The form opens for previewing in your browser (.html) or in MS Word (any other template format).

Prerequisites for emailing a form

- In order to email the form of a selected order, the email server settings must be specified in **System Settings**.
- The addressee's email address must be filled in the contact details in Personnel .



For more information on email server settings, refer to System settings and Personnel .

Editing an email

Procedure

1. Select the form you want to edit before sending it as an email.
For more information on retrieving forms, see [Retrieving forms for orders](#).
2. On the action panel, click Edit email. The Extensive mail messages dialog box appears.
3. Enter the email address of the recipient in the To field. Multiple email addresses can be provided here.
4. Add additional email addresses in Cc email address and Bcc email address fields, as required.
5. Select Yes in the Email as attachment field, if you want to send the form as an attachment.

Note that the forms saved in .doc, .docx, and .rtf formats will always be sent as an attachment.

6. Add any additional documents as attachments in the Attachment - document 1, Attachment - document 2, and Attachment - document 3 fields.
7. In the Content field, type the text that will be displayed in the email body.
 - For the forms saved in .html format, the HTML text is displayed in the content field. If **Yes** is selected in the **Email as attachment** field, the entire content field including any other additional changes to the content will be sent as attachment and stored in the order document that is created. The email body will be empty.

- For the forms saved in .doc, .docx, and .rtf formats, the text entered will be present in the e-mail body. It will not be present in the attachment nor in the order document that is created.
8. Click on the OK button to send the email.
- If the option **Save file copy** is set to **Yes** in the form details, when you email a form and attachments are added, the attachments are zipped and stored along with the order document.
For more details, see [Forms as order documents](#).
 - The attachments that you add, while editing an email, are sent with the current email only. They will not be delivered with the subsequent emails.
 - For more information on adding default file attachments, refer to [Creating a template form](#).



All actions on forms (except the **Preview** action) will create order documents. Additionally, if **Save file copy** on the form is set to **Yes**, a physical document is also created in the **File locations** folder.

Working with order documents

It is possible to link digital documents to orders. Documents may include files such as:

- Cost calculations created in a Microsoft Excel spreadsheet
- Scanned quotations
- Notes (internal communication)
- Generated order forms, for instance, a request for a quotation, a job ticket or order confirmation

Documents can be linked to a selected order via the **Order details > Order documents** step.



In **Field definer**, Planon Administrators can create user-defined business objects based on the following **Order documents**:

- Files
- Forms
- Notes

New layouts for these user-defined business objects can subsequently be created in **Layouts**.

Adding a note/file as an order document

For each document a certain amount of data can be entered. Once completed, document data fields can no longer be modified, except the **Name**, **File document** and **Description** fields.

Procedure

1. Go to Orders.
2. Select one or more orders to which you want to add a document.
3. Go to Order details > Order documents.
4. Click Add on the action panel.
5. Select the type of document you want to add.
6. Enter document data in the data section. For the field information, refer to Document data.
7. Click Save.

An order document is created for the selected order.

If the suborder(s) of the selected order have documents linked to them, these can be made visible by clicking the **Show suborder details** button at the top of the elements list.

Forms as order documents

If forms were generated for an order, you can verify this on Order details > Order documents.

If a form contains attachments, the attachments are zipped in a single file and saved at the secure document location when you send an email. The name of the zipped file is displayed in the **Document (secure)** field at Order details > Order documents. You can view the contents of the zipped file by clicking the **View** button.

For more details, see [Emailing a form](#).



When adding a form, you can choose to save them as **Order document** or as **Communication log**. Selecting **Order document** in the **Save communication as** field will save the forms as order documents (which is the default option). For more information on the fields, see [Forms fields](#).



Ensure that the path to save the secure document is specified in System settings > File locations.
If the zip file cannot be created, an error message is displayed.



Document data corresponding to forms are for reference purposes only and therefore read-only. For more information on generating forms, refer to [Generating forms](#).

Communication logs

Communication logs are records of communication regarding an item that is added to Planon ProCenter . These records are added manually in the respective TSIs and they can include all types of communication such as emails, faxes, reports, transcriptions of phone calls and so on.

You can upload documents as reference or even include a link to a URL, which will always open in a separate browser window.

Communication logs can be added for many elements, for example orders (all order types), properties, visitors, budgets, invoices, and so on.

For communication logs that are automatically created for alerts or forms through the **Log to communication log** field, the **Action** field will be updated to reflect the source. For more information, see [Communication log fields](#).



You can create an action definition in Alerts to automatically delete communication logs based on a schedule.

Adding communication logs

Communication logs are a record of messages sent or received pertaining to an order. These communication logs provide useful information and data that you want to communicate with people on your distribution list so as to add clarity to the details of an order.

Procedure

1. Go to Orders.
2. Select an order to which you want to add the communication log.
3. On the action panel, click Add communication log.
The Add Communication log dialog box appears.

If there are multiple user-defined communication logs available, use the drop-down to select a specific user-defined communication log.



In order to be able to select a user-defined communication log in the drop-down list of the communication log pop-up, a layout must be defined for the communication log, with **Yes** selected at the **For use in pop-up** option and the **Add** action present on the layout.



For more information on adding actions to a layout, see [Layouts](#) .

4. In the Information section, type the message you want to communicate.

5. Click OK.

At the Order details > Communication logs - orders step, you can view the already added communication logs of an order or add new communication logs. For information on the fields, see [Communication logs fields](#).

Forms as communication logs

While adding a form, choosing **Communication log** in the field **Save communication as** will enable you to save the form as communication logs. After selecting a communication log, you can also select the **Communication log type** to which your form belongs. For more information on the fields, see [Forms fields](#).

If forms were generated for an order and if they are selected to be saved as communication logs, you can verify this on Order details > Communication logs - orders.

Communication logs for PMFS orders

If your organization works with the Planon AppSuite app, any related communication logs are added automatically to Order details > Communication logs - orders. Depending on your configuration, communication logs for PMFS orders are added after specific actions are performed on the PMFS mobile devices by field service engineers. These actions include:

- EHS check accepted
- EHS check rejected
- Start work
- Start travel
- End travel
- Wait
- Discontinue
- Pause
- Resume work
- Bar code scan

The above actions on the mobile device can trigger the creation of a communication log for the back-office, which may include the reason why the field service engineer discontinued, paused or rejected the EHS (Environmental Health and Safety check) during the task on hand. The labor hour registration or the files added to the job are also registered in communication logs. Based on the information from the communication log, back-office staff can subsequently decide to reschedule the order or take other appropriate actions.

In addition to communication logs about actions, you can also use communication logs to set up internal communications between field engineers and the back-office. This enables a 'chat' functionality on every job in the job list that is in progress.



- For more information on configuring communication logs for PMFS, see *Planon AppSuite - Configuration Guide*.
- For more information on configuring actions and reasons for PMFS, see [Supporting data](#).

Communication logs for answer lines

When questions of a [questionnaire](#) linked to an order are answered, the answers to the questions are available at Order details > Answer lines. If it is required to provide additional information - such as documents or photos - as evidence for a question, you can add this information via a communication log at the **Communication logs - answer lines** selection step. The answer lines documents are also available at the **Communication logs - answer lines** selection step in the Documents TSI.

For information on the fields, see [Communication logs fields](#).

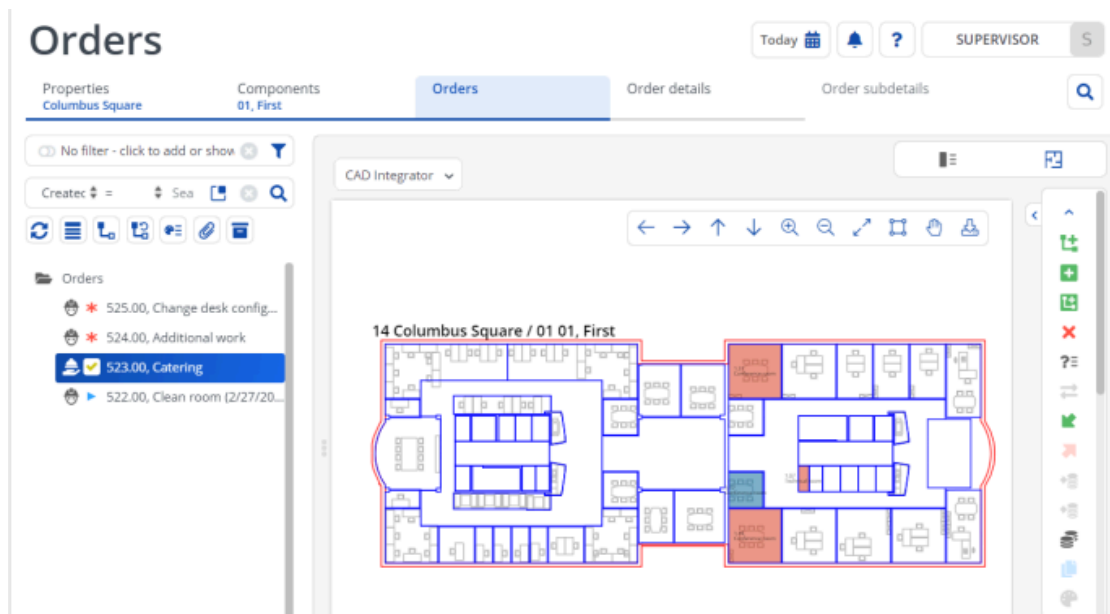


- Your application manager must add the **Communication logs - answer lines** selection step to the Work Orders and Documents TSIs. For more information, see [Configuring selection levels and selection steps](#).

CAD Integrator in Work Orders

[CAD Integrator](#) is a tool that you can use to create graphical representations of spatial information that is registered in Planon ProCenter . In Work Orders , CAD Integrator is available at the **Orders** selection level. Click the relevant toolbar button to start CAD Integrator , after which a floor plan will be displayed.

 The floor plan is a converted AutoCAD drawing.



- When you select an order from the elements list that is linked to a space or workspace, the corresponding location of this order is highlighted on the floor plan. Additionally, all other (work)spaces on the same floor to which orders are linked are highlighted on the floor plan. You can customize the color used to highlight the (work)spaces on the floor plan by adjusting the **Highlighting color** and **Fill color of order-related entity** settings in the **CAD Integrator settings** menu. For more information, see [CAD Integrator settings](#).
- When you select a space or workspace in the floor plan, all orders linked to it will be highlighted in the elements list.

Make sure the following conditions are met to start CAD Integrator in Work Orders and automatically open the corresponding CAD drawing:

- In Spaces & Workspaces an *.orj drawing must be linked to the floor holding the space that is linked to the order;

- In Work Orders , only one order is selected in the elements list. The CAD Integrator drawing that has been linked to the floor of this order's space or workspace is displayed as soon as you start CAD Integrator .



For more information on working with CAD Integrator , see [CAD Integrator](#).

Knowledge Base in Work Orders

The Knowledge Base functionality in Work Orders can be used to retrieve frequently occurring ICT or facility management problems, together with relevant symptoms and solutions. The search functions enable employees to quickly find solutions for common problems. Knowledge Base data can also be linked to new orders of all user-order types. You can open the Knowledge Base from within the **Knowledge Base item** field at the **Orders** selection level or from within the action menu.

You can consult the Knowledge Base to give advice to your FM customer, or include the information in a request or requisition by clicking **Apply**. If you require background information on the selected knowledge base item, you can click **Documents** to verify whether there are digital documents linked to this item, which you can consult.

For more information on knowledge base item documents, refer to [Viewing Knowledge base documents](#)

Retrieving a knowledge base item

On the **Orders** selection level, the **Knowledge Base** dialog box can be accessed:

- from within the **Knowledge Base item** field.

If you have already added an order to which you want to link a knowledge base item, or if you only want to check the knowledge base.

- by clicking **Knowledge Base** on the action panel.

If you have not added an order yet, but want to check the Knowledge Base, or add a new standard order that is linked to a knowledge base item, click the **Knowledge Base** icon in the action menu.

After linking a knowledge base item to your order, depending on your Order settings, the Knowledge Base texts may appear in the **Comment** field.

1. In the Knowledge Base dialog box, search for the relevant knowledge base item.
2. Enter keywords in the search field to search the knowledge base texts and filter out relevant knowledge base items via the search bar.

You can search through the text of a problem, symptom and/or solution, by entering one or multiple keywords in the search field, depending on the option(s) you have selected.

For more information on using the search options, refer to [Finding knowledge base items](#).

The words or word parts you have entered as keywords are highlighted in the texts of the symptoms, problems and/or solutions for the items found in the Knowledge Base.

3. Click Apply.

Finding knowledge base items

In the **Knowledge Base** dialog box you can find relevant knowledge base items by entering keywords in the search field. Additionally, you can refine your search by using the filter search bar.

- If you do not enter a keyword in the search field and subsequently click the magnifying glass icon, all knowledge base items will be displayed.
- If you enter more than one keywords (or part of a word) in the search field, you can either search for knowledge base items which contain all the entered words or the items which contain one of these words.
- You can search based on **problems**, **symptoms** or **solutions**.
- The search is not case sensitive.

Exceptions:

Your Planon ProCenter administrator may have excluded trivial words from Knowledge Base searches.

These words usually include articles such as **the**, **a**, and **an**.

Other words that are often excluded are prepositions such as **in**, **on** and **at**.

Excluded words will not produce any hits, nor are they highlighted once they are entered as keywords.

For example: if you only type the word in with the intention to find all items containing the letters in, such as installation, you will not find anything. You would have to type inst to get a meaningful result.

Applying a knowledge base item to an order

One or more orders can be linked to a knowledge base item in the **Knowledge Base**.

Procedure

1. Select an order for which you want to apply a knowledge base item.
2. On the Knowledge Base item field, open the Knowledge Base dialog box to select a knowledge base item.
3. Click Apply in the Knowledge Base dialog box.

The data of the selected knowledge base item is applied in the order.



The **Apply** button is disabled if the selected knowledge base item is linked to a standard order which is not of the same user-defined order type as the request or requisition you have just added.

Viewing Knowledge base documents

It is possible to view documents with additional information on the selected knowledge base item.

Procedure

1. Go to Orders.
2. Select an order for which you want to view the knowledge base document(s).
3. Click Knowledge base on the action panel.

In the **Knowledge base** dialog box, click the **Documents** button.

4. In the Knowledge base documents dialog box, File field, open the knowledge base document.
5. Click Close, to return to the Knowledge base dialog box.

Retrieving orders based on the same Knowledge base item

It is possible to find orders that are based on the same Knowledge base item.

Procedure

1. Go to Orders.
2. Select an order for which you want to view associated orders, based on the same knowledge base item.
3. Click Knowledge base on the action panel.
4. In the Knowledge base dialog box, click the Applied before? button.

A list of orders linked to the same knowledge base is displayed.

5. Click Close to return to the Knowledge base dialog box.

System reports - Work Orders

The following section describes the system reports that are available in Work Orders .

There are two types of reports in **Work Orders** :

- [Costs overview](#)
- [Completion](#)

These reports are available on every TSI level where orders are displayed.

You can access the system reports from the action menu, **Reports > System reports** tab. You can **Save**, **Preview** or **Edit report settings**.

For the available settings on the **Costs overview** and **Completion reports**, see [System report settings](#).

Costs overview

The **Costs overview** report displays an overview of the order costs.

The report contains Hours, Estimate costs, Labor hours and Actual costs.

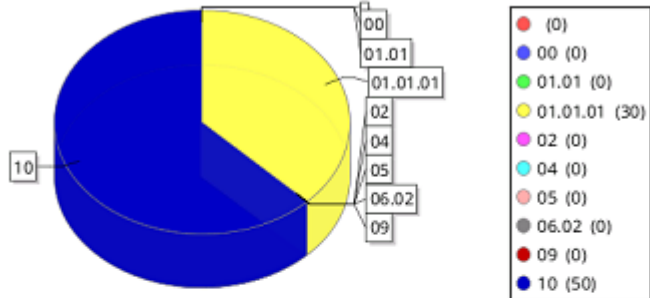
Example of a Costs overview report:

Planon costs overview						Date: 07/14/2016
						Supervisor
						Costs excluding VAT
Number	Description	Hours	Estimate costs	Man-hours	Actual	
27.00	Book space	0.00	0.00 €	0.00	7.50	
25.00	Book space	0.00	0.00 €	0.00	12.50	
23.00	Book space	0.00	0.00 €	0.00	7.50	
21.00	Meeting Control & Accounting	4.00	0.00 €	0.00	11.25	
19.00	Meeting Control & Accounting	0.00	0.00 €	0.00	11.25	
17.00	Training Planon Accelerator	0.00	0.00 €	0.00	35.00	
17.01	Panasonic HDC-SD9	0.00	0.00 €	0.00	15.00	
17.02	Beverage	0.00	0.00 €	0.00	9.00	
17.03	Beverage	0.00	0.00 €	0.00	9.00	
17.04	Food	0.00	0.00 €	0.00	25.60	
15.00	Training Planon Accelerator	0.00	0.00 €	0.00	35.00	
15.01	Panasonic HDC-SD9	2.00	0.00 €	0.00	15.00	
15.02	Beverage	0.00	0.00 €	0.00	9.00	
15.03	Beverage	0.00	0.00 €	0.00	9.00	
15.04	Food	3.00	0.00 €	0.00	25.60	
13.00	Presentation Sales Department	0.00	0.00 €	0.00	27.50	
13.01	Equipment room reservation	0.00	0.00 €	0.00	10.00	
11.00	Presentation Sales Department	0.00	0.00 €	0.00	27.50	
11.01	Equipment room reservation	0.00	0.00 €	0.00	10.00	
9.00	Managers meeting	0.00	0.00 €	0.00	15.00	
9.01	Catering room reservation	0.00	0.00 €	0.00	6.75	
Totals		9.00	0.00 €	0.00	333.95	

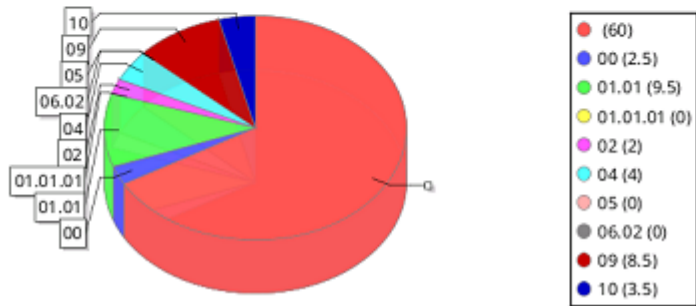
The report also contains a summary of **Overview costs** and **Overview labor hours** in a pie chart (default) or 3D bar chart. For example:

Summary

Overview costs (in €)



Overview man-hours



Completion

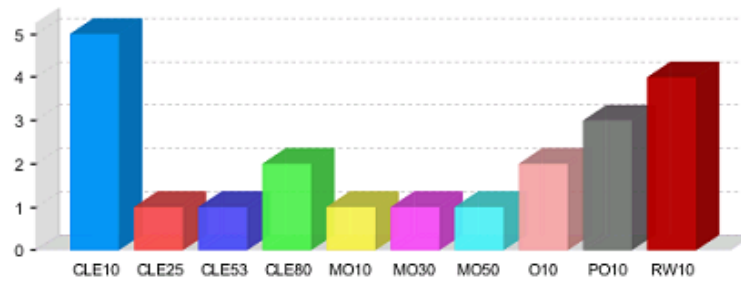
The Completion report displays an overview of orders and their statuses.

It shows the statuses and the number of orders in those statuses, grouped by the field selected in the settings.

Example of a Completion report:

Unknown group

Status	Number of orders
CLE10 Reported	5
CLE25 Cancelled	1
CLE53 In progress	1
CLE80 Administratively completed	2
MO10 Move order reported	1
MO30 Assigned	1
MO50 Administratively completed	1
O10 Reported	2
PO10 Reported	3
RW10 Reported	4



Impact of field changes in orders

Depending on your configuration and settings, modifying order data can have an impact on other order data. This is caused by the fact that fields which represent Planon elements (called business objects in **Field definer**), such as orders, properties, spaces, tradesmen etc., are often mutually dependent.

As a result, changing field data in one place will frequently influence another field's data. Mutual dependencies between elements and the corresponding fields occur as a result of making settings, applying drill-down selections, applying standard orders or using default/preferred tradesmen.

Examples

- If you add a person in the Personnel TSI > **Personnel** selection level and you specify a space in the **Space** data field, which belongs to a different property than the property from which you made your drill-down selection, the original property in the **Property** field will be replaced by the property from the selected space.
- In the **Reservations** TSI, if you change a reservation's reservation unit, the space, property and asset which are linked to this reservation unit will overwrite any space, property or asset data which were previously entered for the selected reservation. These field changes will also become visible for this reservation in the Work Orders TSI.

For more detailed information on this subject, refer to [Field change sequence in Work Orders](#) .

Field change sequence in Work Orders

If you modify field data at the **Orders** selection level, other field data may change automatically, because (default) data of one element is dependent on (default) data of another element. If a series of automatic changes takes place, some data changes take precedence over other data changes. The following table specifies which field data 'outrank' other field data.




Field data which is linked to high-ranking elements (i.e. those with the highest numbers) will overwrite the data of lower-ranking elements.

As you can see, data in the **Priority** field can be overwritten quite easily, while **Standard order** data will overwrite the default data of most other elements, except those of **Knowledge Base** items. Refer to [Field changes exemplified](#) for some examples.

Sequence	Modification of field value
10	Priority

Sequence	Modification of field value
11	Impact
12	Severity
20	Cost center
30	Department
40	External coordinator
50	External tradesperson
70	Space
80	Requestor (internal)
90	Work space
100	Asset
110	Reservation unit
115	Property
120	Order group
130	Trade
140	Externally assigned by
150	SLA service
160	Project
1000	Start date-time
1000	End date-time
1000	Person count
2000	Standard order
2100	Knowledge Base item

 Field changes that involve inheriting field values from other elements are not incorporated in this table.

Field changes exemplified

The following example shows a typical situation which will trigger field changes. Use the table in [Field change sequence in Work Orders](#) to find out which data will overwrite previously specified data in your own situation. The example given may help to identify other common situations in which field changes occur.



It would be impossible to list all potential interdependencies between fields and the resulting changes in field data, as innumerable variables are involved. These examples only serve to increase your awareness of potential interdependencies between fields.

In **Field definer** , a business object setting has been made for requests. This setting prescribes that the property, space, department, and cost center that are linked to a **Requestor** (table position 80) should be automatically copied to the corresponding request.



For more information on making business object settings, refer to [Field definer](#) .

Field definer : the **Order settings** dialog box > **Requestor information** tab, where settings can be made to copy requestor data to various order types...

In the **Order settings** dialog box, you can specify per order type whether requestor data should automatically be included in the new order.

As soon as a requestor is specified for a new request in the Work Orders TSI, the property and space linked to this requestor are automatically copied to the request. If you subsequently modify the requestor in an existing request, any data which was previously specified in the **Property**, **Space**, **Department** and **Cost center** fields will be overwritten.

According to the table on the field change sequences, default data linked to **Workspaces** (table position 90) will overwrite the property and space data that have previously been taken over from the **Requestor** (table position 80). So, as soon as a workspace is specified, the property and space of the requestor could be overwritten.

For example:

A requestor Alice Jones is not linked to any workspace yet. A workspace is specified for requestor Alice Jones. This workspace is linked to Office 310. Consequently, space 310 is automatically entered in the **Space** field. In this case, the workspace *wp1* is specified for requestor Alice Jones. This workspace is linked to Office 310.

Order statuses - configuration per order type

In Planon, **Orders** is a very prominent and highly configurable business object. You can create user-defined order types and corresponding order statuses and status transitions. This topic and the subsequent subtopics explain which order statuses and status transitions can be configured for each order type.

- [Requests statuses](#)
- [Work order statuses](#)
- [Reservations statuses](#)
- [Maintenance orders statuses](#)
- [Move requests statuses](#)
- [Move orders statuses](#)
- [Purchase orders statuses](#)
- [Requisitions statuses](#)

List of actions / functions that may be affected by order status transitions:

Depending on your order configuration, the following actions or functionality are subject to the status configuration of the various order types:

- **Change type:** Can only be applied if the source and target of the user-defined orders have the same *default* status.
- **Transfer to archive:** Only orders which are based on system statuses **Administratively completed**, **Completed**, **Executed** or **Canceled** can be archived.
- **Budgets:** Actual order costs are always subtracted from the budget. For estimated order costs check the **Budget / Costs** column.
- **Behavior of suborders on completion or cancellation main order:** If an order is marked as **Administratively completed** or **Canceled**, a pop-up is displayed asking if any present suborders should also be marked as **Completed** or **Canceled**. This is only possible if these suborders have a status transition to either **Completed** or **Canceled** configured from their current status.

Requests statuses

System Status	Description	User-defined statuses (IWMS Accelerator)	Budget / costs
Reported	This status indicates that it is a newly added request.	Reported	-
In progress	<p>This status indicates that the work to resolve the reported problem has started.</p> <p>If you add a suborder or change the status of a standard suborder, the request will automatically change to In progress.</p>	<p>Customer escalation</p> <p>Follow-up completed</p> <p>Follow-up required</p> <p>In progress</p> <p>Rejected</p>	-
Completed	<p>This status indicates that the reported problem has been resolved.</p> <p>If suborders are linked to it, the system will change the status of these suborders to Administratively completed.</p> <p>If the request has one or more suborders and the last suborder changes its status to Administratively completed, the system will prompt you to change the request status to Completed.</p>	<p>Completed</p> <p>Approved</p>	The budget does not commit the estimates that exceed the actual costs.
Canceled	<p>This status indicates that the request is canceled.</p> <p>If suborders are linked to it, system indicates that the status of these suborders will also change to Canceled. These suborders must have the cancellation status available</p>	Canceled	The budget does not commit the estimates that exceed the actual costs.

System Status	Description	User-defined statuses (IWMS Accelerator)	Budget / costs
	at all times to enable cancellation.		

Work order statuses

System Status	Description	User-defined statuses (IWMS Accelerator)	Budget / costs
Reported	This status indicates that it is a newly added work order.	In preparation Rejected Reported Sent Waiting on customer	The budget does not commit any costs.
Proposal	This status indicates that a proposal is required or available for the execution of the order.	Costs rejected Estimate costs Obtain approval	The budget does not commit any costs.
Accepted	This status indicates that an order is Assigned, On hold or In progress .	Accepted Approved Assigned Escalation in progress Escalation required In progress	Estimations are registered as committed costs. When you register actual costs, the system transfers committed costs into actual costs. If the actual costs exceed the estimate,

System Status	Description	User-defined statuses (IWMS Accelerator)	Budget / costs
Technically completed	This status indicates that an order is technically executed.	Technically completed	the system takes both the estimate and costs into account (expect additional costs)
Administratively completed	<p>After all order data has been checked, the status can be changed to Administratively completed</p> <p>If suborders are linked to it, system indicates that the status of these suborders will also change to Administratively completed. These suborders must have the cancellation status</p>	Administratively completed	<p>Estimations are registered as committed costs. When you register actual costs, the system transfers committed costs into actual costs. If the actual costs exceed the estimate, the system takes both the estimate and costs into account (expect additional costs)</p> <p>The budget does not commit the estimates that exceed the actual costs.</p>

System Status	Description	User-defined statuses (IWMS Accelerator)	Budget / costs
	available at all times to enable cancellation.		
Canceled	<p>This status indicates that the order is canceled.</p> <p>If suborders are linked to it, system indicates that the status of these suborders will also change to Canceled. These suborders must have the cancellation status available at all times to enable cancellation.</p>	Canceled	The budget does not commit the estimates that exceed the actual costs.

Reservations statuses

System Status	Description	User-defined statuses (IWMS Accelerator)	Budget / costs
Requested	This status indicates that it is a newly added reservation. The reservation is created and the room is booked.	-	The budget does not commit any costs.
Option	<p>This status indicates that it is a newly added reservation.</p> <p>For the duration of the reservation option, the reservation unit is not blocked. Hence, another reservation on the same unit can still be created</p>	Option	The budget does not commit any costs.
Made	This status indicates that the reservation is created successfully.	Confirmed No check	Estimations are registered as committed costs. When

System Status	Description	User-defined statuses (IWMS Accelerator)	Budget / costs
Administratively completed	<p>This status indicates that the reservation is completed successfully.</p> <p>If suborders linked to it, system indicates that the status of these suborders will also change to Administratively completed. These suborders must have the cancellation status available at all times to enable cancellation.</p>	<p>Completed</p> <p>Early departure</p>	<p>you register actual costs, the system transfers committed costs into actual costs. If the actual costs exceed the estimate, the system takes both the estimate and costs into account (expect additional costs)</p> <p>The budget does not commit the estimates that exceed the actual costs.</p>
Canceled	<p>This status indicates that the reservation is canceled. After canceling, the room will immediately become available again for reservation.</p> <p>If suborders linked to it, system indicates that the status of these suborders will also change to Canceled.</p>	<p>Canceled</p> <p>No show</p>	<p>The budget does not commit the estimates that exceed the actual costs.</p>

Maintenance orders statuses

System Status	Description	User-defined statuses (IWMS Accelerator)	Budget / costs
Reported	This status indicates that it is a newly added maintenance order.	Reported Waiting on customer	The budget does not commit any costs.
Proposal	This status indicates that a proposal is required or available for the execution of the order.	-	The budget does not commit any costs.
Accepted	This status indicates that an order is Assigned, On hold or In progress .	Assigned In progress On hold Reassigned	Estimations are registered as committed costs. When you register actual costs, the system transfers committed costs into actual costs. If the actual costs exceed the estimate, the system takes both the estimate and costs into account (expect additional costs)
Technically completed	This status indicates that an order is technically executed.	Technically completed	Estimations are registered as committed costs. When you register actual costs, the system transfers committed

System Status	Description	User-defined statuses (IWMS Accelerator)	Budget / costs
Administratively completed	<p>After all order data has been checked, the status can be changed to Administratively completed</p> <p>If suborders are linked to it, system indicates that the status of these suborders will also change to Administratively completed. These suborders must have the cancellation status available at all times to enable cancellation.</p>	Administratively completed	<p>costs into actual costs. If the actual costs exceed the estimate, the system takes both the estimate and costs into account (expect additional costs)</p> <p>The budget does not commit the estimates that exceed the actual costs.</p>
Canceled	This status indicates that the order is canceled.	Canceled	The budget does not commit the estimates that exceed the actual costs.

Move requests statuses

System Status	Description	User-defined statuses (IWMS Accelerator)	Budget / costs
Draft	<p>This status indicates that it is a newly added move request.</p> <p>However, the requester might be still working on the move request and it does not yet need to be picked up by the back office.</p>	Draft	The budget does not commit any costs.
Reported	<p>This status indicates that it is a newly added move request.</p> <p>This move request can be picked up by the back office.</p>	Reported	The budget does not commit any costs.
Approved	<p>When the move request and its move lines have been approved by the responsible manager, the move lines can be assigned to a (standard) move order. With this move order the actual planning phase of the move is started.</p>	Approved	<p>Estimations are registered as committed costs. When you register actual costs, the system transfers committed costs into actual costs. If the actual costs exceed the estimate, the system takes both the estimate and costs into account (expect additional costs)</p>
Planned	<p>If all move lines of a move request have been assigned to a move order, the move request's status is automatically changed to Planned. As a result, the</p>	Planned	-

System Status	Description	User-defined statuses (IWMS Accelerator)	Budget / costs
	move lines can no longer be modified.		
Executed	If all move lines of a move request have been executed because the move orders to which they were assigned have been completed, the move request's status is automatically changed to Executed . As a result, the move lines can no longer be modified.	Executed	The budget does not commit the estimates that exceed the actual costs.
Canceled	This status indicates that the move request is canceled.	Canceled	The budget does not commit the estimates that exceed the actual costs.

Move orders statuses

System Status	Description	User-defined statuses (IWMS Accelerator)	Budget / costs
Reported	This status indicates that it is a newly added move order.	Rejected Waiting on customer	The budget does not commit any costs.
Proposal	This status indicates that the move order can be checked.	Proposal	The budget does not commit any costs.
Accepted	This status indicates that a move order can be executed.	Assigned	Estimations are registered as committed costs. When you register

System Status	Description	User-defined statuses (IWMS Accelerator)	Budget / costs
Technically completed	This status indicates that a move order is technically executed and the data in the database has been modified. The status of the corresponding move request is changed to Executed .	Technically completed	actual costs, the system transfers committed costs into actual costs. If the actual costs exceed the estimate, the system takes both the estimate and costs into account (expect additional costs)
Administratively completed	After all order data has been checked, the status can be changed to Administratively completed	Administratively completed	Estimations are registered as committed costs. When you register actual costs, the system transfers committed costs into actual costs. If the actual costs exceed the estimate, the system takes both the estimate and costs into account (expect additional costs) The budget does not commit the estimates that exceed the actual costs.

System Status	Description	User-defined statuses (IWMS Accelerator)	Budget / costs
	If suborders are linked to it, then the status of these suborders will also change to Administratively completed .		
Canceled	This status indicates that the move order is canceled.	Canceled	The budget does not commit the estimates that exceed the actual costs.

Purchase orders statuses

System Status	Description	User-defined statuses (IWMS Accelerator)	Budget / costs
Reported	This status indicates that it is a newly added purchase order.	Reported	The budget does not commit any costs.
Confirmed	This status indicates that the purchase order has been checked.	Quotation required	The budget does not commit any costs.
Accepted	This status indicates that a purchase order has been checked and approved.	Approved	Estimations are registered as committed costs. When you register actual costs, the system transfers committed costs into actual costs. If the actual costs exceed

System Status	Description	User-defined statuses (IWMS Accelerator)	Budget / costs
Technically completed	This status indicates that a purchase order has been executed.	Technically completed	the estimate, the system takes both the estimate and costs into account (expect additional costs)
Administratively completed	<p>After all order data has been checked, the status can be changed to Administratively completed</p> <p>If suborders are linked to it, then the status of these suborders will also change to Administratively completed.</p>	Administratively completed	<p>Estimations are registered as committed costs. When you register actual costs, the system transfers committed costs into actual costs. If the actual costs exceed the estimate, the system takes both the estimate and costs into account (expect additional costs)</p> <p>The budget does not commit the estimates that exceed the actual costs.</p>

System Status	Description	User-defined statuses (IWMS Accelerator)	Budget / costs
Canceled	This status indicates that the purchase order is canceled.	Canceled Rejected	The budget does not commit the estimates that exceed the actual costs.

Requisitions statuses

System Status	Description	User-defined statuses (IWMS Accelerator)	Budget / costs
Reported	This status indicates that it is a newly added requisition.	Reported	The budget does not commit any costs.
Confirmed	This status indicates that the requisition and requisition lines have been checked.	Checked	The budget does not commit any costs.
Accepted	After the requisition and requisition lines have been checked, a responsible manager can accept the requisition.	Accepted	-
In progress	This status indicates that the request is in progress.	In progress	Estimations are registered as committed costs. When you register actual costs, the system transfers committed costs into actual costs. If the actual costs exceed


System Status	Description	User-defined statuses (IWMS Accelerator)	Budget / costs
Technically completed	This status indicates that the requisition has been completed executed.	Technically completed	the estimate, the system takes both the estimate and costs into account (expect additional costs)
Administratively completed	<p>After all order data has been checked, the status can be changed to Administratively completed.</p> <p>If suborders are linked to it, then the status of these suborders will also change to Administratively completed.</p>	Administratively completed	<p>Estimations are registered as committed costs. When you register actual costs, the system transfers committed costs into actual costs. If the actual costs exceed the estimate, the system takes both the estimate and costs into account (expect additional costs)</p> <p>The budget does not commit the estimates that exceed the actual costs.</p>
Canceled	The order is Canceled.	Canceled	-

System Status	Description	User- defined statuses (IWMS Accelerator)	Budget / costs
		Rejected	



Work Orders - Field descriptions



Order fields



The following table shows the main fields involved in your order administration.

Field	Description
General	
Administratively completed on	The date on which an order is given the Order administratively complete system status.
All suborders completed	This read only field indicates, if all suborders under an Order are completed / canceled. The field is set to No by default. However, if all suborders are set to administratively completed or canceled status, this field is automatically set to Yes on the main order. <div data-bbox="630 1024 1318 1249" style="border: 1px solid blue; padding: 5px;"> If an order flow is applied to the order, canceling the (last) suborder will not set this field to Yes, since the order flow is not completed yet. In order to set this field to Yes, the order flow must be completed manually by canceling its end events. For more information, see Applying an order flow.</div>
Approved by	The person who must authorize the order. For this field a pick list is available, containing people from the Personnel TSI.
Assessment definition	If you want to plan and perform assessments using orders, select a relevant assessment definition in this field. By linking an assessment definition to the selected order you make it possible to prompt field staff to perform the assessment via PMFS. See: Planning and performing (mobile) assessments via a work order .
Asset group	Information on the asset group to which the asset specified in the Asset ID field belongs. The contents of the field cannot be modified.

Field	Description
Asset ID	<p>Select the asset from the list to which the order belongs. Use the filter options for a targeted search.</p> <p>When selecting the asset ID, any additional information related to the asset as defined in the Information text field on Asset and building elements layout is displayed as pop-up. For more information, see Displaying additional requestor / asset information on an order.</p>
Assigned by	<p>The person for whom an order is completed (and who is charged for it). An option can be chosen from a pick list including all addresses of this type in the Addresses TSI.</p>
Budget	<p>The budget to which the order costs are booked. The field can only be completed if the Budgets TSI is available in your configuration.</p>
Communication logs	<p>Displays an overview of all the communication logs of the order. The communication added by the logged in user is shown to the right and any other communication is shown to the left of the Communication logs field.</p>
Contract	<p>This field refers to the contract linked to the order. A contract can be selected from a pick list.</p>
Contract line	<p>This field refers to the contract line linked to the order.</p>
Cost category	<p>The cost category, for example catering or automation, can be selected from a pick list.</p>
Cost center	<p>Select a cost center for the order from the list.</p>
Created by	<p>Enter the name of the person entering the order, if this person is logged on to the system under a valid user name.</p>
Date accepted	<p>Specifies the date on which an order is given the Order accepted system status.</p>
Date-time coloring	<p>Contains the date-time (in the time zone of the property) that is used to color the order when order coloring is turned on.</p> <p>By default, this field will obtain the value of the Requested completion date (on save). However, the user can manually modify it, if required.</p>

Field	Description
Effort	<div data-bbox="630 247 1318 342" style="border: 1px solid black; padding: 5px;">  For more information on coloring the orders, see Priority coloring (Supporting data). </div> <p>This field is only applicable and editable if the Multiple work assignments license and feature are <u>not</u> activated. It displays the number of hours needed to complete the order. Any changes to the tradesperson or the Start date-time will lead to recalculating the End date-time. Any updates of this field will also affect the value in the Planning status field. See Planning status on Orders - conditions for more information.</p>
External company	<p>If an order is completed by an external company, select the relevant company's address from the list. Use the available filter options to retrieve the right External company.</p>
External coordinator	<p>An external person responsible for coordinating the task can be selected in this field.</p>
External requestor	<p>Select an external requestor. The dialog box enables you to select an external requestor or to add people to the list of external requestors.</p>
Floor	<p>From the list, select the floor where the order must be carried out. Use the filter options for a targeted search.</p> <div data-bbox="630 1171 1318 1392" style="border: 1px solid black; padding: 5px;">  If you have already selected a property, the list will automatically display the floors available in that property. If the Property field is empty or if a floor belonging to another property is selected, the Property field is populated with the relevant property of the selected floor. </div>
Follow-up action details	<p>This read-only field displays the follow-up actions (if any) that are linked to the order, with their latest status information.</p>
Internal coordinator	<p>Select a person from the list. The person in the organization responsible for completion of the order can be selected in this field.</p>
Internal tradesperson	<p>Select the employee responsible for carrying out the order. The Internal tradesperson field typically refers to an employee who is (going to be) assigned to the (maintenance) work described in the order, such as technicians, field engineers, inspectors, etc.</p>


Field	Description
Linked observations	This read-only details field shows the ' Linked observations' that will be resolved by the order.
Linked order	By using this field, you can link another order or request to the active order. If the related order/ request is deleted, this field will be emptied.
Number	Displays the automatically generated order number.
Number of people	Enter the number of people for whom a space unit is booked. This field refers to reservations only.
Order group	Select the order group to which an order belongs. For this field, the Planon ProCenter administrator can also specify a default value. For more information on default values, refer to the <i>TSSs</i> and <i>Field definer</i> documentation.
	<div style="border: 1px solid black; padding: 5px;">  Select a priority from the list to specify the term within which an order must be carried out. For more information, see Priorities, (Supporting data) . </div>
Project	In this field you can select one of the available projects from a pick list. For more information, see Creating projects .
Property	From the list, select a property where the order must be carried out. Use the filter options for a targeted search.
	<div style="border: 1px solid black; padding: 5px;">  If you have selected a rentable unit, this field will be automatically updated with the related property. </div>
Property zone	From the list, select an area/zone to which the property belongs. Using the property zone, a single request can be created (instead of creating multiple requests) for the same problem at different premises in an area. Selecting a zone improves usability, responsiveness and productivity.
Quotation date	Specifies the date on which an order is given the Order proposal system status.
Reassign to	Select a trade from the list to reassign the request / order rejected by the selected trade.

Field	Description
Related assets	<p>Displays all the assets linked to the selected order. Archived related assets are also displayed when Include archived records is selected to Yes in Order business object settings.</p> <p>For more information on the setting, see General order settings (Field definer).</p>
Related records	<p>Displays all the records linked to the selected order. Archived related records are also displayed when Include archived records is selected to Yes in Order business object settings. For more information on the setting, see General order settings (Field definer).</p>
Rentable unit	<p>Select a rentable unit from the list. Use the filter options for a targeted search.</p> <div data-bbox="630 806 1318 894" style="border: 1px solid #0070C0; padding: 5px;"> <p> Based on the selection in this field, the property field will be automatically updated.</p> </div>
Requestor	<p>Select a requestor from the list. The requestor is the person reporting the order.</p> <p>When selecting the requestor, any additional information related to the requestor as defined in the Information text field on the Persons layout is displayed as a pop-up. For more information, see Displaying additional requestor / asset information on an order.</p>
Reservation unit	<p>Link a space unit or asset unit to the order.</p> <div data-bbox="630 1260 1318 1381" style="border: 1px solid #0070C0; padding: 5px;"> <p> If the selected reservation unit is linked to a default calendar, the working days and hours of that default calendar will apply to the order.</p> </div>
Standard order	<p>Select the standard order that you want to apply to your order. The standard orders displayed in the list depend on the order group selected at the Components level.</p> <p>Skip this field, if you do not want to apply a standard order.</p> <p>If you add a suborder to an order that is based on a standard order, all standard orders of the order group that have been completed for the main order are displayed.</p>
Status	<p>Displays the order's status, as selected on the action panel. All order types have predefined statuses and status transitions that can be used to indicate in which phase a particular task is.</p>


Field	Description
	<p>Status transitions are user-definable and can be configured to suit your specific situation.</p> <p>If so configured, Planon ProCenter will ask you if a job ticket (or other order form) should be generated upon a status transition, for example from status Reported to status Accepted. If the answer is Yes, you can send the tradesperson responsible for repairs a job ticket by email.</p> <p>Special symbols denoting the current order status may have been assigned to the order descriptions in the elements list.</p> <p>For example:</p> <p>▶ Request in progress</p>
Technically completed on	The date on which an order is given the Order technically complete system status.
Trade	Select a specific trade from the list, to link to the order.
User-defined type	Displays the user-defined version of the Orders business object. See also Order types .

SLA fields


SLA service	<p>If a request or order is entered and the SLA service field is also completed, Planon ProCenter checks whether the service is linked to a service level agreement (SLA) and whether the SLA is linked to an SLA contract line. If this is the case, all SLA information, such as costs and response time is copied to the request/order.</p>
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- You can link an SLA service to a standard request/order in Supporting data . If a help desk employee enters a new request or order that is based on this standard request/order the **SLA service** field is populated automatically.

Field	Description
SLA	<p>For details, see Creating standard requests/orders, (Supporting data).</p> <p>For details on creating SLA services, see SLA Management.</p> <ul style="list-style-type: none"> To display a limited number of services with a valid SLA based on the data entered in the order, select Only display services with a valid SLA to display in the SLA service dialog box.
Reported on	This field is automatically populated with the SLA linked to the SLA service when the SLA is applied to an order or request.
Requested response date-time (user)	Displays the date and time when the order was added.
Requested response date-time (property)	Specify the date and time at which the service provider should respond to the order. This time is initially calculated using the SLA's Time to respond on the basis of Original reporting date-time . If this is not specified, the Reported on date is used.
Requested completion date-time (user)	Specify the date and time at which the service provider should respond to the order. This time is based on the time zone of the selected property.
Requested completion date-time (property)	Displays the date and time at which the order should be completed. This time represents the time zone of the user.
	<p> For more information, see Multiple Time Zones. This date-time is initially calculated using the Priority of the order on the basis of the Original reporting date-time. If this is not specified, the Reported on date is used.</p>


Field	Description
Actual response date-time (user)	<p>Specify the actual date-time at which the service provider responded to the order. This field is updated only if the <i>Multiple time zones</i> feature is enabled.</p> <p>The Actual response date-time is automatically calculated and populated when the status of the order is changed to Order accepted (applies to work orders) or Request in progress (applies to requests). If required, you can change this date-time.</p>
Actual response date-time (property)	<p>Displays the actual date-time at which the service provider responded to the order. This time is based on the time zone of the selected property.</p>
Actual completion date-time (user)	<p>Use this field to specify the order's actual completion date-time. This field is updated only if the <i>Multiple time zones</i> feature is enabled.</p> <p>The Actual completion date-time is automatically calculated and populated when the status of the order is changed to Order technically completed(applies to work orders) or Request completed (applies to requests). If required, you can change this date-time.</p>
Actual completion date-time (property)	<p>Displays the order's actual completion date and time. This date-time is based on the time zone of the selected property.</p>
Original reporting date-time	<p>Enables you to specify a date-time that should be considered as the date-time at which the order was entered. When entered, this date-time is used to:</p> <ul style="list-style-type: none"> • calculate the Requested response date-time, Requested date-time to attend, Requested date-time to fix, Requested completion date-time of the order • search SLAs

 If the above calculations are based upon the (planned) **Start date-time**, they are not affected by the **Original reporting date-time** and this field is therefore made read-only. If no **Original reporting date-time** is specified, the **Reported on** date-time will be used in the above calculations.




Field	Description
	If an SLA is applied, this field can only be changed for existing orders if the order has not been processed yet (still in the Reported status).
SLA priority	Specify a number to search for an SLA. By specifying an SLA priority for the order, a specific SLA can be found via the SLA scope.
Weighting	Specify a number to indicate the importance of the order. Based on the weighting, the completion time score and response time score are calculated. The value in the Weighting field can also be adopted from the SLA.
Completion time score	Displays the completion time score calculated based on the weighting. This score indicates if the order has been completed in time or too late. If the Actual completion date-time is less than (or equal to) the Requested completion date : Completion time score = Weighting If the Actual completion date-time is greater than the Requested completion date : Completion time score = (-1 * Weighting)
Response time score	Displays the response time score calculated based on the weighting. This score indicates if the response on the order was in time or not. If the Actual response date-time is less than (or equal to) the Requested response date-time : Response time score = Weighting If the Actual response date-time is greater than the Requested response date-time : Response time score = (-1 * Weighting)


Health & Safety fields

EHS required?	Select Yes if the field engineer has to acknowledge health and safety information when working on the order.
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 Only applicable if the **EHS check required** order setting in the Planon AppSuite is set to **EHS required**. For more information, see *Planon AppSuite - Configuration Guide*.

PMFS / AppSuite fields

Field	Description
Location description	Enter the details of the location where the order is to be carried out. This will enable you to register enhanced information of the location.
PMFS status	<p>Displays the processing status of the PMFS order (AppSuite only):</p> <ul style="list-style-type: none"> • Accepted: the engineer has accepted the assigned job on the mobile device. • Finished: the engineer has completed the job on the mobile device.
Appointment booking?	<p>Click Yes if the PMFS order must appear as an appointment booking on the mobile device of the field engineer (internal tradesperson). Once the order is made into an appointment booking, its start date is fixed.</p>
	<p> If there are multiple work assignments linked to this order, these will have their own PMFS statuses. In that case, this order field becomes obsolete.</p>
	<p> If you are working with <i>multiple work assignments</i> (licensed feature), this field is set to Yes if one of the order's work assignments is an appointment booking (its Appointment booking? field is set to Yes). See the <i>Work Assignments</i> documentation for information on the relation between orders and work assignments.</p>
	<p> If the Start date-time of the order is not filled in, the order will not show as appointment booking on the mobile device. In the PMFS app, field engineers can recognize appointment bookings by their icon. They should not start earlier or work longer on the order without consulting the customer first.</p>
High priority?	<p>The default setting in this field is No (no fixed start date).</p> <p>Click Yes if the PMFS order must appear as a high priority order on the mobile device of the field engineer (internal tradesperson). Field engineers can recognize high priority orders by their icon in the PMFS app.</p> <p>The default setting in this field is No (no high priority).</p>

Field	Description
	 It is possible to make an order both a high priority order <i>and</i> an appointment booking, by setting both fields to Yes . In that case, the PMFS order on the field engineer's mobile device is marked by a merged icon.
Sign-off required?	Click Yes if it is required that the customer signs off the job on the mobile device of the field engineer, to acknowledge that the work was completed as agreed.
Sign-off by engineer required?	Click Yes if it is required that the engineer signs off the job on the mobile device upon completing the job, to acknowledge that the job has been fully executed.

Service Providers related fields (including Subcontractors)

Outsourced assignment	This field is only available on planned maintenance (PPM) orders. It is a reference to an Outsourced assignment on a contract with a subcontractor.
Subcontractor	This field is only available on planned maintenance (PPM) orders. It is a reference to the subcontractor by whom the PPM order is carried out. The link with the PPM order comes from an Outsourced assignment (= subcontractor contract line) on a Subcontractor contract .
Team	Reference to a linked service team. If Allocation agreements are configured and used within the Service Providers solution, the team will be automatically detected upon creating / generating a work order or PPM order.

Work assignment related fields (Multiple work assignments feature enabled)

Original budgeted hours	Enter the number of hours you originally had available as the 'time budget' for the entire order. Each time a work assignment is created, with its own number of assigned hours, these hours are subtracted from the original budgeted hours on the order.
Remaining budgeted hours	Shows the number of budgeted hours that has not yet been spent on the order.
Planning fields (Orders, PPM orders, Move orders)	

Field	Description
Planned start date-time (work assignment)	<p>Displays the date and time at which the work assignment should start. This date-time is based on the time zone of the selected property.</p> <p>After the Multiple work assignments feature is enabled, this field can become editable and be populated under the following conditions:</p> <ul style="list-style-type: none"> the order's Internal tradesperson and requested Start date-time are filled in, while the Planned start date-time is still empty and there are no active work assignments. the work assignment's Start date-time is populated.
Planned start date-time user (work assignment)	<p>Read-only field that displays the date and time at which the work assignment should start. This date-time represents the time zone of the user.</p>
Planned end date-time (work assignment)	<p>Displays the date and time at which the work assignment should end. After the Multiple work assignments feature is enabled, this field can become editable and be populated under the following conditions:</p> <ul style="list-style-type: none"> the order's Internal tradesperson and requested End date-time are filled in, while the Planned end date-time is still empty and there are no active work assignments. the work assignment's End date-time is populated.
Planned end date-time user (work assignment)	<p>Read-only field that displays the date and time at which the work assignment should end. This date-time represents the time zone of the user.</p>
Planning status	<p>This read-only field shows the most recent planning status of the order:</p> <ul style="list-style-type: none"> UNK, Unknown UNP, Unplanned PPL, Partially planned <p>Note: this status is only available if multiple work assignments are</p>

Field	Description
	<p>allowed on an order and at least one of them is planned.</p> <ul style="list-style-type: none"> • PLA, Planned • REP, Requires replanning <p>Which planning status is shown, is based on the time that has already been spent on the related work assignment(s). See Planning status on Orders - conditions for detailed information.</p> <p>Upon completion or cancellation of the order, this field is cleared.</p>
Total no. of assigned hours	Displays the total number of assigned hours of all work assignments.

Planning status on Orders - conditions

The value that is displayed in the **Planning status** field of PPM orders, move orders and reactive orders is system-calculated and read-only. The following tables explain the conditions that determine which planning status is displayed for an order, based on the linked work assignment(s). Field changes, status updates and other actions on orders and work assignments are the typical triggers for (re-)calculation of the **Planning status** field. The tables are intended for resource planners and other back-office employees who are looking for more background information about this field.

 Pre-condition for showing the **Planning status**: the order must have a system status *other than Canceled, Technically completed, or Administratively completed*. Also, the order's user-defined status should not be used within the **Completed** status mapping.

1. Planning status if the Activate 'multiple work assignments'? business object setting on Orders is set to Yes in Field definer

Planning status displayed	Conditions for showing this status
Unknown (UNK)	<ol style="list-style-type: none"> 1. The order field Original budgeted hours = 0, or empty ... OR 2. The fields Original budgeted hours > 0 and the Remaining budgeted hours = 0 ... AND ... the total of the Assigned hours from all work assignments >= the value in Original

Planning status displayed

Conditions for showing this status

budgeted hours ...

AND ... there are no work assignments linked in statuses **Planned, Assigned, Accepted, Travel, Work, Wait, Paused** ... AND ... there is at least one work assignment linked in status **Temporary fix** or **Done**.

Unplanned (UNP)

1. The order field **Original budgeted hours** contains a value that is > 0 ... AND ...
 - The field **Original budgeted hours** minus the field **Remaining budgeted hours** = 0 ... AND ... There are no linked **Declined** or **Stopped** work assignments ... OR ...
 - The **Remaining budgeted hours** = 0 ... AND ... The total **Assigned hours** of all work assignments \geq the value in **Original budgeted hours** ... AND ... There is at least one work assignment that does not have the **Declined, Stopped, Temporary fix** or **Done** status... WHERE ... The **Planned start date-time** or the **Planned end date-time** is not filled in ... AND ... the **Resource allocation** is empty.

Partially planned (PPL)

1. The field **Original budgeted hours** minus the field **Remaining budgeted hours** is not 0 ... AND ...

Planning status displayed**Conditions for showing this status****Planned (PLA)**

2. **Original budgeted hours** > 0 ... while the field **Remaining budgeted hours** is not 0 ... AND ...
3. There are no work assignments linked in the statuses **Declined** or **Stopped**.

1. The field **Original budgeted hours** > 0 and the **Remaining budgeted hours** = 0 ... AND ...
2. The total of the **Assigned hours** from all linked work assignments >= **Original budgeted hours** while there is at least one linked work assignment that is not in the status **Declined**, **Stopped**, **Temporary Fix** or **Done**, ... WHERE ...The fields **Assigned hours**, **Planned start date-time** and **Planned end date-time** contain a value, OR the field **Resource allocation** contains a value.

Requires replanning (REP)

1. The field **Original budgeted hours** > 0 ... AND ...
2. At least one linked work assignment has the status **Declined** or **Stopped** ... AND ...
3. The total of the **Assigned hours** from all linked work assignments with statuses **Declined** or **Stopped** are

Planning status displayed	Conditions for showing this status
	less than the Original budgeted hours .

2. Planning status if the Activate 'multiple work assignments'? business object setting on Orders is set to No in Field definer

Planning status displayed	Condition for showing this status
Unknown (UNK)	<ul style="list-style-type: none"> There are no work assignments linked to the order ... OR ... There is at least one work assignment linked to the order that is not Declined or Stopped.
	AND
	<ul style="list-style-type: none"> The value in the Effort field = 0, or not filled in.
Unplanned (UNP)	<ul style="list-style-type: none"> There are no work assignments linked to the order.
	OR
	<ul style="list-style-type: none"> There is at least one work assignment linked to the order that is not in the Declined, Stopped, Temporary fix or Done status, and whose Planned start date-time or whose Planned end date-time

Planning status displayed

Condition for showing this status

is not filled in
and whose
Resource allocation field
is also empty.

AND

- The value in the **Effort** field > 0.

Partially planned (PPL)

status not applicable

Planned (PLA)

- The value in the **Effort** field > 0.

AND

- There is at least one work assignment linked to the order that is not in the **Declined**, **Stopped**, **Temporary fix** or **Done** status, whose **Effort** field is filled in, and whose **Planned start date-time** or **Planned end date-time** is filled in or whose **Resource allocation** field is filled in.

Requires replanning (REP)

- There are only linked work assignments linked with statuses **Declined** or **Stopped**.

OR

- There are only linked work assignments

Planning status displayed	Condition for showing this status
	with statuses Declined , Stopped , Temporary fix or Done and a value in the Effort field that is > 0.

Order line fields

Field	Description
General	
Order	The number and description of the corresponding order are displayed.
Item group	Specify the item group from which items can be ordered. The required item group can be selected from a pick list.
Purchase item	Specify the item to be ordered. If the Item group field is populated first, the only items shown are the items from the selected item group.
Number	Specify a number to allocate a number to the order line.
Order quantity	Specify the order quantity, for example 5 if you want to order five boxes or 1 if you want to order one dozen. The order quantity may vary from the actual number of items you wish to order.
Product unit	Specify the unit for the items to be ordered, e.g. pieces, meters, boxes, dozen or pallets.
Standard cost type	Select a standard cost type for the item.
Standard cost category	Select a standard cost category for the item.
Discount / Surcharge %	Enter a value to specify whether a discount or surcharge applies. A discount is indicated by a negative value and a surcharge by a positive value. For example, a 20% discount is specified by entering -20, a 10% surcharge is specified by entering 10. The minimum value is -100.00. There is no limitation on the maximum value.

Field	Description
Tax tariff / VAT rate	Select a tax / VAT tariff from the list.
Total costs excl. tax / VAT	This calculation field shows the total amount of the order line, excluding tax / VAT. The calculation is: Quantity * (100 + Discount/Surcharge %) * Price excl. tax/VAT / 100
Total costs incl. tax / VAT	A calculation field showing the total amount including tax / VAT. The formula for the calculation is: amount excluding VAT + VAT.
Reported back?	Specify whether or not the order delivery is reported back.
Expected costs from activity definition	If the order line belongs to a maintenance order, this read-only field shows the type of expected costs on which the order line is based: additional costs, material costs or labor hours costs. For more information on maintenance orders, refer to Working with Maintenance orders in Work Orders .
Labor costs including tax / VAT	A read-only calculation field containing the total amount of labor costs including tax / VAT: labor costs excluding VAT + VAT.
Service Provider fields	
Material type	The material type is retrieved from the product in the order line. You can also select a material type from the list. The material type describes the type of material to which a material term applies.
Vendor catalog price	Enter the original price of the article specified in the vendor's product catalog. This field is automatically populated if you select a purchase item on the order line.

Quotation fields

Field	Description
Order	Displays the order linked to the selected quotation.
Supplier	Select the name of the external contractor (the organization sending the quotation) from the list.

Field	Description
Contact person	Select the name of a contact person in the organization that is offering the quotation.
Requisition made on	Specify the date on which the requisition is made.
Date of receipt	Specify the date on which the quotation is received.
Costs	Specify the quoted amount.
VAT tariff	Enter the applicable VAT rate.
VAT amount	Displays the VAT amount on the basis of the value in the VAT tariff field. The value can be modified manually. When done, the VAT tariff field is automatically emptied.

Estimate fields

Field	Description
Code	Displays a unique code for the estimate.
Order	Displays the order for which an estimate is made.
Description	Specify a name for the estimate.
Calculation file	Browse for and open or upload the file with the cost calculation, for example a Microsoft Excel or Lotus file.
Estimate date	Displays the date on which the estimate is added. This date cannot be modified.
Number of hours	Enter an estimated number of hours for the order completion.
Costs	Enter the estimated costs.
VAT tariff	Select from the list a VAT tariff that applies to the general costs.
Costs excluding VAT	The total amount of estimated costs excluding VAT is calculated as follows: (number of hours * tariff per hour) + costs. The amount cannot be modified.
Costs including VAT	This calculation field displays the total estimated amount including VAT: ((number of hours * tariff per hour) + VAT) + (costs + VAT). The amount cannot be modified.
Tariff group	For each tariff group a VAT tariff and an hourly rate are specified. If you select a tariff group from the pick list, the

Field	Description
	Hourly rate and VAT tariff (hours) fields are automatically populated. The values in the fields can be modified.
Active estimated costs	Specify if this estimate is the active estimate to be used for the calculations. The last added estimate is automatically the active estimate. Only one estimate can be the active estimate.
Hourly wage	Once the Tariff group field has been completed, the hourly rate is automatically specified. The suggested value can be modified.
VAT tariff (hours)	Once the Tariff group field has been populated, the corresponding VAT tariff is automatically specified. The suggested value can be modified.
VAT amount hours	Planon ProCenter automatically calculates the amount of VAT to be paid. This is done on the basis of the tariff selected in the VAT tariff (hours) field. The value in the field can be modified. The VAT tariff (hours) field is automatically emptied.
VAT amount	Here, the amount of VAT to be paid is automatically calculated. This is done on the basis of the tariff selected in the VAT tariff field. The value in the field can be modified. In that case, the VAT tariff field will be emptied automatically.

Actual costs fields


Field	Description
Invoice number	Displays the invoice number.
Description	Specify a description for the actual cost line.
Orders	Displays the number and description of the selected order.
Costs	Specify the amount spent.
Hour costs	Specify the amount spent on labor hours.
VAT tariff	Select from the list a VAT tariff that applies to the actual costs.
VAT amount	The amount of VAT to be paid is automatically calculated. This is done on the basis of the tariff selected in the VAT tariff field. The value in the field can be modified. The VAT tariff field is automatically emptied.


Field	Description
External tradesperson	Specify the business relation who sent the invoice. You can select an address of the External company address type from the pick list. (Depending on how Planon ProCenter is configured and used within your organization, this can also be another department or business unit).
Costs excluding VAT	A calculation field for the costs excluding VAT: material costs + hour costs.
Costs including VAT	A calculation field for the costs including VAT: costs excluding VAT + VAT.
Entry date	The date on which the invoice is booked in.
Type	The value in this field is automatically updated based on the type of Order costs.

Labor hour fields

Field	Description
General	
Code	A sequence number is automatically added to each new labor hour line. The code for the sequence number can be modified.
Description	Enter a description for the labor hours.
Internal tradesperson	An internal tradesperson can be specified on the order and automatically displayed in this field. You can also select a different internal tradesperson here.
External co-worker's name	The name of an external co-worker that was entered by a field engineer on the Planon PMFS Live app . External co-workers are not registered in the Planon database, but their labor hours are registered on the order.
Number of hours	This field is a calculated field if a Start date-time and End date-time are filled in for labor hours (for example via a Planon app). The difference between start and end date-time is populated. The number of hours can also be entered / edited manually.

Field	Description
Start date-time	The time when actual work on the order (work assignment) was started. This time is used in the calculation of the Number of hours field.
End date-time	The time when actual work on the order (work assignment) was ended. This time is used in the calculation of the Number of hours field.
Tariff group	If a tariff group is specified on the order, it will be automatically displayed in this field. However, this value can be modified.
Hourly wage	Once the Tariff group field is specified, the hourly rate is automatically updated. This data can be modified.
Surcharge hours %	A surcharge can be specified in this field, for example 150% for working during the night.
Special tariff line	<p>If special tariffs for overtime registration are applicable: select a relevant special tariff line from the list.</p> <p>Precondition: the internal tradesperson entered on this labor hours layout, must be linked to a special tariff group for working hours in Personnel .</p> <p>Special tariffs for working hours can be used <i>instead of or in combination</i> with surcharge percentages, to calculate the labor hours costs made during deviating working hours such as weekends or bank holidays. This functionality is typically used in configurations that include Planon Mobile Field Services (PMFS).</p>
VAT amount (hours)	<p>The VAT amount applicable to the labor hours is automatically specified. This is done on the basis of the VAT tariff entered in the VAT tariff field. The value can be modified manually. In this case the VAT tariff field is emptied.</p>

 If labor hours are entered on the order itself using the **Add labor hours** action on the action panel, the tariff group field will be pre-filled with the tariff group selected on the person linked to the logged-in user account. If the person does not have a tariff group, last selection is remembered and filled in.

 For more information on configuring special tariff groups for working hours, see Supporting data .

Field	Description
VAT tariff	Once the Tariff group field is specified, the corresponding VAT tariff is automatically updated. The suggested value can be modified.
Costs excluding VAT	The total costs for labor hours excluding VAT: number of hours * tariff per hour.
Costs including VAT	A calculation field for the total labor hour costs including VAT, namely: costs excluding VAT + VAT.
Order	In this field the number and description of the selected order are automatically specified.

AppSuite fields

Finalized?	<p>If the AppSuite setting Real-time updates? is set to Yes and time registration is finalized upon selecting the Pause action on the app, back-office staff can see in this field that the labor hour registration is actually finalized. This field is still editable in the back-office, while the labor hour record on the app has been made read-only.</p> <p>If the setting Real-time updates? is set to No, and if finalizing time registration is enabled for the Pause reason, labor hours records are finalized automatically if the field engineer selects Pause on the app. See Configuring labor hour registration</p>
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Service Provider fields



Reversed labor hours	This field shows the <i>code</i> and <i>description</i> of the labor hour record that was reversed after the Reverse labor hours action was performed. See the <i>Service Providers - Customer data setup</i> documentation for more information on reversing labor hours.
Subcontractor	Select the subcontractor for whom you want to register labor hours. See the <i>Service Providers - Back-office Operations</i> user documentation for more information on subcontractors.
Tradesperson category	If applicable in your configuration, this field displays the linked Tradesperson category (via the labor hour terms or internal tradesperson) used for labor hour revenue calculations.

Field	Description
	See Tradesperson categories in the Service Providers documentation for more information.

Requisition line fields

Field	Description
Order	Planon ProCenter automatically copies the number and description of the related order. The value in the field cannot be modified.
Line number	Planon ProCenter automatically specifies a sequence number for the requisition line.
Standard requisition line	Reference to the standard requisition line on which this requisition line is based.
Product	The requested product. This field contains a pick list that displays all products registered and maintained in the Product Catalog .
Quantity	The number of products you want to order.
Requested delivery date	Enter a delivery date for the requested product.
Distribution point	<p>The default distribution point registered for the selected product.</p> <p>Multiple distribution points may be available for a product. You can select any one of the distribution points where the selected product is available.</p> <p>If the product or quantity is changed in the requisition line, the distribution point is also updated.</p> <p>If multiple distribution points are available for the product, the distribution point with the highest sequence ID is chosen.</p> <p>If no distribution point is found for the selected/changed product, the distribution point of the main property of the requisition line is selected. If no distribution point is found for any property on higher levels, the distribution point field is cleared.</p>

 The distribution point is automatically determined in the **Reported** status based on the property or internal tradesperson selected. When a requisition line is set to **Accepted** status, the distribution point field cannot be changed. In order to change the distribution point, the requisition line must be set back to **Reported** status.

Field	Description
Code	Here you can enter a code for the requisition line.
Product unit	The unit used when ordering a requested product, such as pieces, meters, box or set. Select a unit from the list.
Sub-issuings allowed?	The value Yes indicates that the requested product can be issued in multiple sub-issuings.
	<p> If Yes is selected in the Stock Management > Automatic reservation and Sub-issuings allowed? fields, stock is reserved immediately based on the availability. If No is selected for the Sub-issuings allowed? field, the status of this stock request is changed to Reserved only if full stock is available. If there are other stock requests in the queue (with less quantity and/or sub-issuings allowed) they will be processed first.</p> <p> For more information on automatic reservation, see <i>Stock Management</i>.</p>
Status	Displays the current requisition line status. Example: if the requisition's status is changed from Requisition reported to Requisition confirmed , the requisition line status also automatically changes from Reported to Confirmed .
Price (excl. tax / VAT)	The price of the product as registered in the Product Catalog. However, you can modify the price as required.
Price submitted on	The date on which the price was submitted.
Tax / VAT tariff	The VAT tariff applicable for the product as on date.
Adjustment percentage	A discount of or a surcharge on top of the standard amount. A surcharge of 20% is specified by 20, whereas a discount of 20% is specified by -20.
Total cost excl. tax / VAT	This calculation field shows the total amount excluding VAT. The formula for the calculation is: $\text{items} * 100 + (\text{Discount/Surcharge \%}) * \text{standard amount} / 100$
Total cost incl. tax / VAT	This calculation field shows the total amount including VAT. The formula for the calculation is: Amount excluding VAT + VAT tariff.
Standard cost category	Select a standard cost category from the list. This field is not visible by default. Contact your Planon ProCenter administrator for making it available.

Field	Description
Standard cost type	Select a standard cost type from the list. This field is not visible by default. Contact your Planon ProCenter administrator for making it available.
Item type	The item type the requested product belongs to, for example a video. You can also modify the item type as required.
Brand	The brand of the requested product as registered in the Product Catalog. However, you can modify the brand as required.


Purchase order line fields


Field	Description
Code	Here you can enter a code for the purchase order line.
Purchase item	The requested purchase item. This field contains a pick list including all purchase items. Purchase items are registered and maintained in Supporting data > Item groups > Items .
Quantity	The number of purchase items you want to order.
Product unit	The unit used when ordering a requested purchase item, such as pieces, meters, box or set. This can be done using the pick list. Planon ProCenter will automatically specify a value if this field has been completed for a purchase item in Supporting data . The value in the field can be modified.
Price excl. VAT	The price specified for the purchase item in Supporting data is automatically copied into this field. You can modify this value.
Adjustment percentage	A discount of or a surcharge on top of the standard amount. A surcharge of 20% is specified by 20, whereas a discount of 20% is specified by -20.
Total price excl. VAT	This calculation field shows the total price excluding VAT. The formula for the calculation is: Quantity * 100 + (adjustment percentage) * price excl.VAT.100
VAT tariff	The VAT tariff specified for the purchase item in Supporting data is automatically copied into this field. You can modify this value.

Field	Description
Total price incl. VAT	This calculation field shows the total price including VAT. The formula for the calculation is: Total price excl. VAT * 100 + VAT tariff.100
Status	This read-only field displays the purchase order line status. Planon ProCenter automatically changes the status if the status of the purchase order is changed. If the purchase order status is changed from Purchase order reported to Purchase order confirmed , the purchase order line status also automatically changes from Reported to Confirmed .
Distribution point	The default distribution point registered for the purchase item concerned. Planon ProCenter automatically completes the value if this field has been completed for a purchase item in the Product Catalog TSI. The value in the field can be modified. You can select any distribution point that has been specified for this catalog item.
Purchase order	Planon ProCenter automatically copies the number and description of the purchase order concerned. The value in the field cannot be modified.
Name	The name of the selected purchase item is automatically specified in this field.
Price submitted on	The date specified for the purchase item in Supporting data is automatically copied into this field. You can modify this value.
Product unit	The order unit used by the supplier. An order unit of 100 means that the item can only be ordered in batches of 100 or a multiple of 100.
Line number	Planon ProCenter automatically specifies a sequence number for the purchase order line. This field is read-only.

Work assignment fields

Field	Description
Action date-time	Date-time stamp, displaying the date-time of the last action by the assigned user (tradesperson / engineer). Example: an engineer completes a job on the device, but is working offline. The Action date-time will be populated with the moment the job was completed on the device. The Ended on field however, is populated with the moment the back-office sets a status to finalize the job.


Field	Description
Actual start date-time	This field is automatically populated with a date-time as soon as the work assignment's status is set to Work . The date-time represents the time zone of the property.
Actual start date-time (user)	This field is automatically populated with a date-time as soon as the work assignment's status is set to Work . The date-time represents the time zone of the user.
Actual end date-time	This field is automatically populated with a date-time as soon as the work assignment's status is set to Declined, Stopped, Temporary fix or Done . The date-time represents the time zone of the property.
Actual end date-time (user)	This field is automatically populated with a date-time as soon as the work assignment's status is set to Declined, Stopped, Temporary fix or Done . The date-time represents the time zone of the user.
All work completed? <i>[only editable on a key work assignment]</i>	<p>If the Main responsible engineer sets this field to Yes on a Key work assignment and the work assignment's status is Done, the order is completed. If this field is set to No and the work assignment status is then set to Done (and there are no other active key work assignments), the order is put On hold.</p> <p>If this field is empty (=default value) and the key work assignment is set to Done, the order is set to Completed.</p>
Appointment booking?	Click Yes if the work assignment must appear as an appointment booking on the mobile device of the field engineer (internal tradesperson). Once made into an appointment booking, it has a fixed start date. Field engineers can recognize appointment bookings by their icon in the PMFS app. The default setting in this field is No .
	<div style="border: 1px solid black; padding: 5px;"> <p> The following applies to both 1: 1 planning and 1: n planning: if one associated work assignment is defined as an appointment booking, the corresponding order is also defined as an appointment booking.</p> </div>
Assigned hours	This field is only applicable and editable when the Multiple work assignments license and setting is activated (to enable <i>multiple work assignments</i> on an order). Precondition: The Original budgeted hours field on the order must contain a value. The Assigned hours field displays the calculated number of hours needed by the tradesperson

Field	Description
Default work assignment?	<p>to carry out the work assignment. For more information, see Budgeted hours' based resourcing.</p> <p>Indicates whether this work assignment was based on a work order that existed before you upgraded to work assignments. It will be used for synchronizing existing jobs that do not have work assignment information yet.</p>
Effort	<div style="border: 1px solid #0070C0; padding: 5px;">  This field is only applicable and editable if the Resource PlannerPro' license for Work assignments is <u>not</u> activated. </div> <p>Displays the number of hours needed to complete the work assignment. Any changes to the tradesperson or the Start date-time will lead to recalculating the End date-time.</p>
Ended on	<p>Date-time stamp for ending the work assignment. A work assignment is considered 'ended' if the back-office sets a final status (Declined, Temporary fix, Stopped or Done). This field does not take into account the Action date-time.</p>
Expected arrival date-time	<p>Displays the expected arrival date-time entered by the tradesperson / engineer on accepting the work assignment.</p>
Internal tradesperson	<p>Select the tradesperson / field engineer who must carry out the work assignment.</p>
Keep in sync?	<p>Technical field, used to update the order with data from the work assignment or vice versa.</p>
Key work assignment	<p>Indicate whether the work assignment is a key work assignment.</p>
Order	<p>Displays the order to which the work assignment is linked.</p>
Planned end date-time	<p>Specify the date and time at which the work should be ended. The end date-time is calculated automatically if the Effort or Assigned hours fields are filled in. This date-time is based on the time zone of the selected property.</p>
Planned end date-time (user)	<p>Specify the date and time at which the work should be ended. This time represents the time zone of the user.</p>

Field	Description
Planned start date-time	Specify the date and time at which the work should be started. This date-time is based on the time zone of the selected property.
Planned start date-time (user)	Specify the date and time at which the work should be started. This time represents the time zone of the user.
PMFS status (AppSuite only)	<p data-bbox="735 516 1318 575">Displays the processing status of the PMFS work assignment:</p> <ul data-bbox="768 600 1185 1474" style="list-style-type: none"> <li data-bbox="768 600 1185 726">• Empty: the work assignment is either not on the device, or on the device, but not yet accepted or rejected. <li data-bbox="768 747 1185 936">• Accepted: the engineer has accepted the assigned work assignment (job) on the mobile device. Even if the engineer works offline, the job will remain on the device. <li data-bbox="768 957 1185 1327">• Finished: the engineer has <i>ended</i> the work assignment on the mobile device (End work, Discontinue, Temporary fix, Reassign or EHS declined). After changing to this status, both the work assignment and order are updated with the data added by the engineer. The job is removed from the device. <li data-bbox="768 1348 1185 1474">• Retracted: the work assignment has been successfully retracted by the back-office.
Reason	If an action + reason has been configured for the this work assignment's status, the Reason field refers to the reason entered by the tradesperson / engineer on a specific action (status transition).
Reason for sign-off refusal reason	Displays the reason entered by the customer when refusing to sign-off the job on the tradesperson's / engineer's mobile device.
Retracted by back-office?	This field is set to Yes if a work assignment is stopped by the back-office, while it was already accepted by the field engineer. There may still




Field	Description
	be job data on the device. A warning is shown in Planon ProCenter that job data will be retracted upon the next synchronization of the device. On the app, the field engineer is informed that the job has been retracted by the back-office. The job data is automatically sent to the back-office. Once processed, the PMFS status field is set to Retracted .
Status	Displays the system status of the work assignment.
Trade	Reference to the trade that applies to the work assignment.

Forms fields

Field	Description
Code	Enter a code for the form.
Name	Enter a name for the form.
Save file copy	Select Yes , to save a copy of the form to the location on your local disk as specified in the System settings > File locations .
Form	Select a mail merge report to be used when generating a form.
Save as PDF	Select Yes in order to save and send the mail merge document as PDF instead of its original file format. This only applies to forms in <i>.rtf</i> , <i>.doc</i> or <i>.docx</i> file formats.
	<div data-bbox="721 1394 1325 1520" style="border: 1px solid blue; padding: 5px;">  If this field is not available on your layout because of authorization settings, the form is saved in the original format. </div>
User status	Select the order's user-defined status to which the form applies. The form will then appear when you open the Forms pop-up for an order in this status.

The following fields only apply when emailing forms


Addressee	Select an addressee of the order template form. The addressee can be a person or address of an external requestor.
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Field	Description
Copy to	Allows you to copy the form to other recipients.
	 The Addressee and Copy to fields can be any field on the order referring to a person, address or external requestor, including Free fields or Free reference fields.
Sender's email address	Select the email address that should be used to send an email.
Reply email address	Select the email address that should be used when the user replies to a sent email.
	 The Sender's email address and Reply email address fields will be retrieved from the following locations, in the priority order given below: <ul style="list-style-type: none"> • Layout • Forms • Account settings • Property settings • Outgoing email settings
Add ticket name to email subject	If you click Yes , the name of the selected mail merge report will be added to the beginning of the email subject.
	 The (print) forms on status change will only work if you have the appropriate authorization for this field.
Email subject report	The report contains information about the fields to be shown in the email subject. By default, the email's Subject field contains the Code & Description .
	 It is recommended to link a data-only report specifying the required content. For more information on data-only reports, see Reports > Creating data-only reports .
Save communication as	Select Communication log to save order forms/documents as communication logs. Order document is selected by default.
Communication log type	When you select Communication log in the Save communication as field, this field is enabled and you can choose the type of communication log that your form/ ticket is saved to.

Field	Description
Default attachment – document 1/2/3	Specify the location of the document(s) to be attached to the email by default. You can attach up to three documents.

Communication logs fields

Field	Description
Code	Enter a unique code for the communication log.
Description	Enter a relevant description to briefly describe the communication log.
Action	When a communication log is created by an alert or a form (via the Log to communication log field), the value in this field will reflect this accordingly: <ul style="list-style-type: none"> • Form generated • Alert generated
Start date-time	Specify the start date and time of the communication log.
End date-time	Specify the end date and time of the communication log.
Responsible contact (Addresses)	Specify an address.
Responsible person (Personnel)	Specify a person responsible for the communication.
Version	Specify a version number.
Document reference	Browse and upload the file that you want to add as a reference document (if any).
Document (secure)	Select a secure document (if any).
URL	Specify a URL if the information you want to add is available on a website.
Image	Select an image for reference related to the order.

Field	Description
Mail merge document	This read-only field shows the contents of the sent mail merge document.
	<div style="border: 1px solid red; padding: 5px;">  This field must be added to the communication logs layout in order to save forms as files to the communication logs. </div>
Communication owner	Enter any communication in the text box.
Communication reader	In the comments box, the reader can enter communication related to the order.

Document fields

Field	Description
Name	Specify a document name.
Date/time document	The date and time when the document has been added.
Version	Specify a version number.
Type	Displays the document type, for example a file or note.
File document	Browse and upload the file that you want to add as a document. The file name and path appear in the field.
Comment	Enter a comment/remark, if any.

System report settings

Parameters	Description
Title	Specify a title for the report.
Subtitle	Specify a subtitle for the report.
Report group by field	Select a field to group the report data by.
Use 3D bar chart	Select Yes to include a 3D bar chart in the report. A pie chart is displayed by default.

Parameters	Description
Show costs including VAT	Select Yes to display the costs including VAT. This field is specific to the Costs overview report.

Checklist item data on orders

Field	Description
Code	Enter a code for the checklist item.
Standard activity definition	Select a relevant standard activity definition from the dialog box.
Description	Enter a relevant description for the checklist item.
Sequence	Enter a number that reflects the order in which the checklist item must be carried out.
Comment	If relevant, enter comments to the checklist item. Information entered in this field, in either the Maintenance Library (standard activity definition) or by back-office personnel in Work Orders (on a maintenance activity) is not displayed on the mobile devices of field engineers, but remains visible only to the back-office. However, if a field engineer enters comments to the corresponding Comment field on the PMFS app, the information is uploaded periodically to the back-office and added incrementally to any existing comments.
Mandatory?	Select Yes to make the checklist item a mandatory part of completing the order.
Result	Displays the result for a checklist item, as selected on the PMFS app. The default value is Not assessed . The other results that can be selected are: Assessed with observation , Unable to assess (only supported by the PMFS Live app) or Done . If you select Assessed with observation , it is mandatory to enter a reason in the Reason field. This PMFS related field is only shown in maintenance activity checklists on the order.
Reason	Displays the reason for the result of the checklist item, as selected on the PMFS app.

Field	Description
	This PMFS related field is only shown in maintenance activity checklists on the order.

Used line fields

'Used lines' are basically requisition lines that have been edited on the PMFS Live app or that have been added / updated by the back-office in the **Orders TSI > Order subdetails level > Used lines** step.

Field	Description
Quantity	The number of products actually used for the selected order.
Requisition line	The code and name of the product that was ordered via a requisition line.
Code	The product's code.
Name	The product's name.

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